Calamos Investments® Privacy Policy

At Calamos Investments, we are committed to conducting ourselves with total integrity and to the highest standards of prudent business practice. Your financial privacy is an important part of these activities. Our Privacy Policy outlines the steps we take to protect your personal information. Preserving your trust and confidence reflects our dedication to maintaining long-term client relationships.

Why It Is Important We Share Our Privacy Policy

We believe that maintaining the privacy of your personal financial information is an essential piece of the service that we provide. This Privacy Policy explains how Calamos Investments handles your personal financial information, and the procedures that we follow to ensure your privacy.

What Types of Personal Information Does Calamos Investments Collect?

We collect information about you to help serve your financial needs, provide customer service, and fulfill various legal and regulatory requirements. The type of information that we collect from you will vary based upon the product or service that we provide, and may include:

> Information included on applications, questionnaires, new account forms and other related forms such as your name, address, Social Security number, assets and income;

> Information about your transactions with us such as purchases, sales, account balances, and bank account information;

> Information provided or captured on our website; including any information captured on our website through the use of “cookies”.

How Does Calamos Investments Share Your Information?

First and foremost, Calamos Investments does not sell lists of client information, nor do we disclose client information to marketing companies, with the exception of companies we may hire to provide specific services for us, as described below. We do not disclose any of the information described above to anyone, except as provided by law. Specifically, Calamos Investments may share non-public personal information with our affiliates in the course of processing transactions, managing accounts on your behalf, or to inform you of products or services that we believe may be of interest to you. Additionally, we may share non-public personal information with the following types of third parties:

> Our financial service providers such as custodians and transfer agents; and

> Non-financial companies under servicing or joint marketing agreements, such as printing firms and mailing firms that may assist us in the distribution of investor materials.

In all cases, your information is strictly protected. These third parties are bound by law or by contract to use your information only for the services for which we hired them, and are not permitted to use or share this information for any other purpose. This policy applies to current and former clients. If you access our services or products through another financial intermediary, such as a wrap fee sponsor, your intermediary’s policy will govern how it uses your personal information.

Calamos Investments® Privacy Policy

Your Right to Opt Out

Calamos Investments does not sell or distribute non-public information to third parties, except as provided above. If, in the future, our policies were to change, you would be notified and provided an opportunity to opt out of our disclosing that information. That is, you could tell us not to disclose the information to any other person or entity.

Calamos Investments does not discriminate against clients who exercise any privacy rights, nor do we discriminate in responding to client requests for access to or deletion of their personal information.

How We Keep Your Information Secure and Confidential

In order to further protect you, Calamos Investments maintains strict internal security measures. We restrict access to your personal and account information to those employees who need to know that information to service your account. We also maintain physical, electronic and procedural safeguards that comply with industry standards to guard our non-public personal information.

To protect your accounts online, encryption technology – such as Transport Layer Security – is used to prevent unauthorized access. Before accessing your accounts online, you are required to provide verification of who you are and a password/PIN number. We request your help in this process by keeping your identification information and password/PIN number private and restricting access to your personal computer.

As a client of Calamos Investments, you can rely on our commitment to protect your personal information and privacy.

CALAMOS COMPANIES PROVIDING THIS NOTICE:

» Calamos Advisors LLC

» Calamos Advisors Trust

» Calamos Financial Services LLC

» Calamos Investment Trust

» Calamos Wealth Management LLC

» Calamos Convertible Opportunities and Income Fund

» Calamos Convertible and High Income Fund

» Calamos Dynamic Convertible and Income Fund

» Calamos Global Dynamic Income Fund

» Calamos Global Total Return Fund

» Calamos Strategic Total Return Fund

» Calamos Global Opportunities Fund LP

» Calamos Long/Short Equity & Dynamic Income Trust

CALAMOS®
INVESTMENTS

Calamos Investments LLC
2020 Calamos Court | Naperville, IL 60563
800.582.6959 | www.calamos.com | caminfo@calamos.com

PRIVSTMTGEN 945 0422 CAL 10001

Systematic Exchange Form

CALAMOS INVESTMENTS

Mail to: Calamos Family of Funds
c/o US Bancorp Fund Services, LLC
P. O. Box 701
Milwaukee, WI 53201-0701

Overnight mail to: Calamos Family of Funds
c/o US Bancorp Fund Services, LLC
615 E. Michigan St., 3rd Floor
Milwaukee, WI 53202-5207

Use this form to establish a Systematic Exchange Plan (“Plan”) for your account. A Plan will initiate exchanges between your accounts at regular, periodic times. Please read everything carefully and complete all sections of this form. To ensure timely processing, please return this form within fifteen days of the initial transaction. Exchanges between different classes of shares are not allowed.
Note: Please do not use this form to establish a Systematic Exchange from an IRA account to a non-IRA account. Instead, please call us at 800.582.6959 and request an IRA Distribution form. If you are under the age of 59½ and are making an exchange from an IRA account to a non-IRA account, along with regular tax liability, you may be subject to a premature distribution penalty.
If you are exchanging from a non-IRA account to an IRA account, the purchases to your IRA account will be recorded as current year contributions.

Please print. If you have any questions about completing this application, call a Customer Service Representative at 800.582.6959
(Hours: Monday-Friday, 8:00 a.m. to 6:00 p.m. Central time).

1. YOUR ACCOUNT INFORMATION

Please specify your account information.

Account Registration

Social Security Number

2. ACCOUNT YOU WOULD LIKE TO EXCHANGE FROM

Please review the prospectus carefully before submitting any systematic exchange requests. If you have any questions, please call a customer service representative at 800.582.6959.

SELECT FUNDS	SELECT SHARE CLASS		EXCHANGE AMOUNT
☐ Growth	☐A (606)	☐C (620)	$
☐ Growth and Income	☐A (604)	☐C (618)	$
☐ Timpani Small Cap Growth	☐A (5650)	☐C (5672)	$
☐ Timpani SMID Growth	☐A (5653)		$
☐ Select	☐A (634)	☐C (636)	$
☐ Dividend Growth	☐A (1982)	☐C (1983)	$
☐ Global Opportunities	☐A (607)	☐C (621)	$
☐ International Growth	☐A (645)	☐C (647)	$
☐ International Small Cap Growth	☐A (5785)	☐C (5786)	$
☐ Global Equity	☐A (1913)	☐C (1915)	$
☐ Evolving World Growth	☐A (1952)	☐C (1954)	$
☐ Convertible	☐A (603)	☐C (617)	$
☐ Global Convertible	☐A (2971)	☐C (2972)	$
☐ Market Neutral Income	☐A (605)	☐C (619)	$
☐ Hedged Equity	☐A (2977)	☐C (2978)	$
☐ Phineus Long/Short	☐A (5084)	☐C (5085)	$
☐ High Income Opportunities	☐A (608)	☐C (622)	$
☐ Total Return Bond	☐A (1929)	☐C (1931)	$
☐ Short-Term Bond	☐A (5617)		$
☐ Global Sustainable Equities	☐A (5703)	☐C (5704)	$
☐ Fidelity Investments Money Market Treasury Portfolio	☐A (5141)		$

Systematic Exchange Form

3. EXCHANGE FREQUENCY

Make my exchanges ☐ Monthly or ☐ during the following months:

☐ January ☐ February ☐ March ☐ April ☐ May ☐ June

☐ July ☐ August ☐ September ☐ October ☐ November ☐ December

Start/stop my Systematic Withdrawal on this day: ______ (for example, January 10 is 01/10).
(If you do not select a day, your withdrawal will be processed on or about the 25th of the month).

4. ACCOUNT YOU WOULD LIKE TO EXCHANGE INTO

If you are establishing a new account, you must meet the applicable new account minimum of $2,500 (or $500 for IRA accounts)

Please review the prospectus carefully before submitting any purchase requests. If you have any questions, please call a customer service representative at 800.582.6959.

SELECT FUNDS	ACCOUNT NUMBER	SELECT SHARE CLASS	
☐ Growth		☐ A (606)	☐ C (620)
☐ Growth and Income		☐ A (604)	☐ C (618)
☐ Timpani Small Cap Growth		☐ A (5650)	☐ C (5672)
☐ Timpani SMID Growth		☐ A (5653)	
☐ Select		☐ A (634)	☐ C (636)
☐ Dividend Growth		☐ A (1982)	☐ C (1983)
☐ Global Opportunities		☐ A (607)	☐ C (621)
☐ International Growth		☐ A (645)	☐ C (647)
☐ International Small Cap Growth		☐ A (5785)	☐ C (5786)
☐ Global Equity		☐ A (1913)	☐ C (1915)
☐ Evolving World Growth		☐ A (1952)	☐ C (1954)
☐ Convertible		☐ A (603)	☐ C (617)
☐ Global Convertible		☐ A (2971)	☐ C (2972)
☐ Market Neutral Income		☐ A (605)	☐ C (619)
☐ Hedged Equity		☐ A (2977)	☐ C (2978)
☐Phineus Long/Short		☐A (5084)	☐C (5085)
☐ High Income Opportunities		☐ A (608)	☐ C (622)
☐ Total Return Bond		☐ A (1929)	☐ C (1931)
☐ Short-Term Bond		☐ A (5617)	
☐ Global Sustainable Equities		☐ A (5703)	☐ C (5704)
☐ Fidelity Investments Money Market Treasury Portfolio		☐ A (5141)	

5. SIGNATURE

☐ I understand that this Systematic Exchange Plan will operate until I cancel the Plan, either via telephone to the Funds' transfer agent or in writing to same. While there is no fee if there is not enough cleared money in my account to cover a withdrawal, I understand that the Fund may redeem my remaining position in the Fund and close my account. Also, I acknowledge that if a Plan is stopped due to insufficient funds, it will not automatically restart and that I must submit a new Systematic Exchange Plan form to restart the Plan.

Lastly, I have read and understand the prospectus and any supplements to it, especially the sections that pertain to the Systematic Exchange Plan.

x	
Primary Owner Signature*	Date (MM/DD/YYYY)
x	
Joint Owner Signature* (if applicable)	Date (MM/DD/YYYY)

* If shares are to be registered in (1) joint names, both persons must sign, (2) a custodian for a minor, the custodian should sign, (3) a trust, the trustee(s) should sign, or (4) a corporation or other entity, an officer should sign and print name and title on the space provided for the Joint Owner.

CALAMOS
INVESTMENTS

Calamos Financial Services LLC, Distributor
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800.582.6959 | www.calamos.com | caminfo@calamos.com

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