

# 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  
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Calamos Investments LLC.  
PRIVSTMTGEN 945 0422 CAL 10001

# Systematic Withdrawal

**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

To complete this application, you will need:

- » Your Social Security Number
- » Your Account Number
- » An unsigned, voided check or preprinted savings deposit slip (if applicable)

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

Account Number

Social Security Number

## 2. INITIATE SYSTEMATIC WITHDRAWAL

To initiate the Systematic Withdrawal Plan, your account must have a minimum share balance of \$25,000.

The Systematic Withdrawal Plan is a service available to shareholders of the Calamos Family of Funds, making possible regular withdrawals (minimum: \$50 per fund account) of Fund shares. Each month, the Fund's transfer agent can arrange for the withdrawal and payment into your bank account.

Make my Systematic Withdrawals:  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).

# Systematic Withdrawal

## 2. INITIATE SYSTEMATIC WITHDRAWAL (CONTINUED)

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

Please indicate the Fund(s) from which the payment is to be made and the amount of payment.

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

## 3. MAIL OR DIRECT DEPOSIT OF PROCEEDS

Choose to have your check mailed or proceeds deposited into your bank account. Check will be mailed to the address of record.

Address (for mailing checks). Proceeds will be mailed on the above requested date(s) to:

<input type="text"/>	<input type="text"/>	<input type="text"/>
Shareholder's First Name	M.I.	Last Name
<input type="text"/>		
Date of Birth (MM/DD/YYYY)		
<input type="text"/>		<input type="text"/>
Street Address		Apt./Suite #
<input type="text"/>	<input type="text"/>	<input type="text"/>
City	State	Zip Code

# Systematic Withdrawal

### 3. MAIL OR DIRECT DEPOSIT OF PROCEEDS (CONTINUED)

For direct deposit to your bank account, you must attach a voided check or preprinted savings deposit slip.

Bank Information

<input type="text"/>	<input type="text"/>
Bank Name	ABA Number
<input type="text"/>	<input type="text"/>
Bank Account Number	Bank Account Number
<input type="text"/>	
Bank Address	
<input type="text"/>	<input type="text"/>
City	State
	Zip Code

**Tape your voided check or preprinted savings deposit slip here. Please do not staple.**

### 4. SIGNATURE AND CERTIFICATION

Signatures must be exactly as name(s) appear under "Your Account Information".

If your account is the account of an individual, the individual should sign; if joint owners, all should sign; if a custodian for a minor, the custodian should sign; if a corporation or other organization, an officer should sign (indicating corporate office or title); if a trust or other fiduciary, the trustee or fiduciaries should sign (including capacity). By signing, you are authorizing US Bancorp, LLC to honor all debts.

<input type="text"/>	<input type="text"/>
X Individual Owner Signature	Date (MM/DD/YYYY)
<input type="text"/>	<input type="text"/>
X Joint Owner Signature (if any)	Date (MM/DD/YYYY)
<input type="text"/>	<input type="text"/>
X Custodian Signature	Date (MM/DD/YYYY)
<input type="text"/>	<input type="text"/>
X Officer, Trustee Signature, etc.	Date (MM/DD/YYYY)
<input type="text"/>	<input type="text"/>
Title of Officer, Trustee, etc.	Date (MM/DD/YYYY)

# Systematic Withdrawal

## 5. MEDALLION SIGNATURE GUARANTEE

A Medallion Signature Guarantee is a method of identity verification that protects against fraud. It can be obtained from a bank, trust company, or other financial institution.

A notary public is not an acceptable guarantor since it does not include financial assurance against fraudulent activity.

You'll need a Medallion Signature Guarantee for the bank account owners if the names on the bank account are not the same as those on your Calamos account.

Medallion Signature Guarantee (Affix Medallion Signature Guarantee here)

**CALAMOS**<sup>®</sup>  
INVESTMENTS

Calamos Financial Services LLC, Distributor  
2020 Calamos Court | Naperville, IL 60563-2787  
800.582.6959 | [www.calamos.com](http://www.calamos.com) | [caminfo@calamos.com](mailto:caminfo@calamos.com)

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