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Form ADV Part 2B: Brochure Supplement

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This Brochure Supplement is dated June 20, 2014.

This supplement provides information about E. Kingdon Hurlock, Jr. that supplements the Calvert Investment Counsel brochure. You should have received a copy of that brochure. Please contact Francine M. Schindler, Administrative Assistant if you did not receive Calvert Investment Counsel's brochure or if you have any questions about the contents of this supplement.

Additional information about E. Kingdon Hurlock, Jr. is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ***Item 2 – Educational Background and Business Experience***



E. Kingdon Hurlock, Jr., CFA, CIC

**Year of birth:** 1944

**Formal education after high-school:** Trinity College, Hartford, Connecticut (4 years, graduated 1966 – B.S. Economics), Graduate business studies 1968-70

### **Business background:**

Calvert Investment Counsel – Managing Partner, Senior Investment Officer 10/1988 – current

Baker, Watts Investment Counsel – Senior VP, Treasurer 04/1985 - 10/1988

Redwood Capital Management – VP, Portfolio Manager 04/1977 - 04/1985

National Central Financial – VP, Senior Trust Investment Officer 1970-77

### **Professional Designation Explanation**

#### **The CFA Program –**

The CFA (Chartered Financial Analyst) Program is a graduate-level self-study program that combines a broad-based curriculum of investment principles with professional conduct requirements. It is designed to prepare you for a wide range of investment specialties that apply in every market all over the world.

To earn a CFA charter, you study for three exams (Levels I, II, III) using an assigned curriculum. If you pass all three exams and meet the professional and ethical requirements, you can become a regular member of CFA Institute, or “charterholder.”

You can take as long as you need to complete the program, and there is no limit to the number of times you can take each exam. The curriculum changes each year to reflect the dynamic nature and complexity of the global investment profession.

Investment industry employers and media around the world recognize the CFA designation as the gold standard of professional excellence. Completing the CFA Program places you in elite company, confirming your mastery of the program’s rigorous curriculum and your commitment to the formidable challenge of passing all three levels of examinations.

The CFA Program reflects a broad Candidate Body of Knowledge™ (CBOK) developed and continuously updated by active practitioners to ensure that charterholders possess knowledge grounded in the real world of today’s global investment industry. Unlike many postgraduate programs, the self-directed study format allows you to continue working while you progress.

#### **The CIC Program –**

The CIC (Chartered Investment Counselor) designation is issued by Investment Adviser Association (IAA)

A candidate must first obtain a CFA, then be employed be a member of the Investment Adviser Association (IAA) and have five years of related work experience. Designation implies that advisor has significant experience with investment counseling and portfolio management, and that the advisor is held to a higher set of ethical standards.

### ***Item 3 – Disciplinary Information***

An investment advisor and its supervised persons (IA Reps) must disclose material facts about any legal or disciplinary event that is material to a client's evaluation of the advisory business or of the integrity of the IA Rep. There are no material legal or disciplinary events to disclose for E. Kingdon Hurlock, Jr.

### ***Item 4 – Other Business Activities***

E. Kingdon Hurlock, Jr. is not actively engaged in any business or occupation for compensation outside of his position with Calvert Investment Counsel.

### ***Item 5 – Additional Compensation***

E. Kingdon Hurlock, Jr. receives no additional compensation or economic benefit for services provided.

### ***Item 6 – Supervision***

E. Kingdon Hurlock, Jr. is the President and Chief Compliance Officer of Calvert Investment Counsel. As such, he is responsible for all advice provided to clients.



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This Brochure Supplement is dated August 17, 2016.

This supplement provides information about Jacolyn Wetmore, that supplements the Calvert Investment Counsel brochure. You should have received a copy of that brochure. Please contact Francine M. Schindler, Administrative Assistant if you did not receive Calvert Investment Counsel's brochure or if you have any questions about the contents of this supplement.

Additional information about Jacolyn Wetmore, is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ***Item 2 – Educational Background and Business Experience***



Jacolyn Wetmore  
**Year of birth:** 1970

**Formal education after high-school:** B.S. in Business from Syracuse University and an MBA from Clarkson University.

### **Business background:**

Calvert Investment Counsel – Vice President, Investment Advisor Representative 07/2016 – current  
PBMares Wealth Management LLC – Investment Advisor Representative 01/2013 – 07-2016  
PBGH Financial Advisors, Inc. – Investment Advisor Representative 11/2012 – 01/2013  
Access Capital Management LLC – Vice President, Director of Client Services 01/2010 – 10/2012  
United Bank – Vice President, Senior Wealth Advisor 01/2005 – 11/2009  
Banknorth Group, Inc. – Asst. Vice President, Business Development Officer 12/1999 – 01/2005

## ***Item 3 – Disciplinary Information***

An investment advisor and its supervised persons (IA Reps) must disclose material facts about any legal or disciplinary event that is material to a client's evaluation of the advisory business or of the integrity of the IA Rep. There are no material legal or disciplinary events to disclose for Jacolyn Wetmore.

## ***Item 4 – Other Business Activities***

Jacolyn Wetmore. is not actively engaged in any business or occupation for compensation outside of her position with Calvert Investment Counsel.

## ***Item 5 – Additional Compensation***

Jacolyn Wetmore receives no additional compensation or economic benefit for services provided.

## ***Item 6 – Supervision***

Jacolyn Wetmore provides investment advice customized to reflect client objectives. All securities and policies are determined and approved by Calvert's Investment Committee comprised of all senior advisors. In addition, E. Kingdon Hurlock, Jr. Chief Compliance Officer monitors portfolios for investment objectives and other supervisory reviews. E. Kingdon Hurlock, Jr. can be contacted at the phone number of the main office as shown on the cover page.