



MACKENZIE
Investments

Dealer Relations

Giving back and creating an impact through financial planning



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Giving back is a key part of our society and most Canadians make it a priority to donate to charitable causes they believe in and support. Although Canadians feel the need to give back, many do not have a planned strategy and tend to donate when they feel the need, or when they have the funds. A well-planned, long-term donation strategy can help make a real difference in supporting their charitable organization of choice.

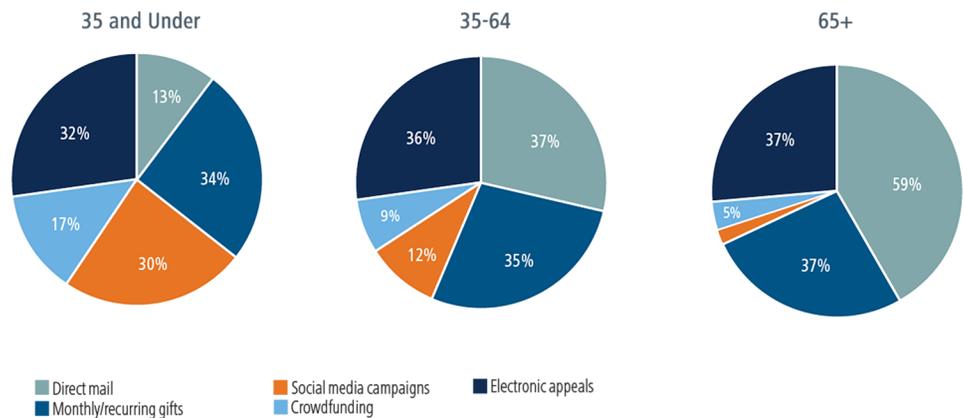
The Mackenzie Charitable Giving Program provides the opportunity for donors to include the act of giving back as part of their overall financial plan and leave a legacy of giving. This program helps simplify a continuous giving strategy, which allows donations to grow over time to create a real impact.

Canadians donate to a diverse range of causes, reflecting people's unique perspectives on what's important in their lives. According to the CanadaHelps.org 2021 giving report, 1.1 million Canadians donated more than \$480 million to nearly 30,000 charities through CanadaHelps, an organization that connects donors and charities through technology.¹ Many more might support charities through donations at the checkout counter at grocery stores, special events or online.

Even though different age cohorts may prefer to use different donation methods, it's clear they're all willing to support charities they believe in. The Mackenzie Charitable Giving Program offers donors a more planned, focused, flexible and convenient way to make a lasting impact to the charities dearest to them through continuous, strategic and tax-deductible giving.

The chart below provides an insight on the method of giving per age group.

How Canadians give by age cohort



Source: The 2017 Burk Donor Survey

¹ <https://www.canadahelps.org/en/the-giving-report/download-the-report/>



Why the Mackenzie Charitable Giving Program?

At Mackenzie we understand the power of giving back and creating a meaningful impact that allows donors to leave a lasting legacy. To help donors achieve their charitable giving goals we created the Mackenzie Charitable Giving Program in 2006. The program integrates giving into their overall financial plan, while providing immediate tax benefits. We've simplified giving so investors can focus on what matters most – the causes they care about.

“This program provides a simple and convenient solution to integrate giving back into an investor’s financial plan while offering immediate tax benefits, as they focus on the causes they care about.”

Mackenzie Charitable Giving Program by the numbers

\$198.0

million in donations
received since
inception

Over

2,500

charities
supported

\$65.9

million in grants
paid out to charities
and institutions

Source: Mackenzie Investments June 30, 2021

How does it work?

- 1** Open and name the account to create a family legacy, honour a lost one or to help support the cause of the charity you are donating to.
- 2** Provide an initial donation of \$10,000 or more in cash, publicly listed stocks, mutual funds, insurance or segregated funds – all of which are eligible for a donation tax credit.
- 3** Choose the charity of your choice. You can grant to Canadian registered charities and any other institutions prescribed by the Income Tax Act regulations.
- 4** Grants are made to any number of charities or institutions based on the investor’s recommendation, which are issued by the charitable giving foundation. A minimum donation of \$250 applies to each grant.
- 5** All donation records are kept, and statements and tax receipts are issued accordingly.



Features of the charitable giving program:

Mackenzie Charitable Giving Program features

Minimum initial gift	\$10,000
Additional donations	\$500
PAC plan	\$125 quarterly or \$500 annually
Name of foundation	Strategic Charitable Giving Foundation
Investment options	13 Mackenzie Investment Mutual Funds
Choice	Name your account, give anonymously, choice of investment in your account, grant amounts that flow to designated charities, which charities to support and name your successors.
Administration fee	0.55% Amounts > \$2.5M negotiable
Donation fee	None

What are the benefits and how do donors grow the impact of their donations?

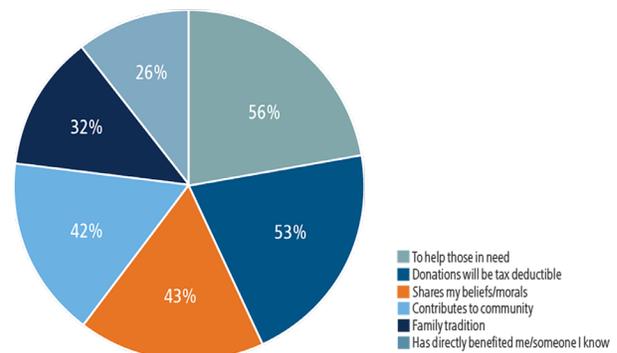
- 1 Recurring grants provide the comfort of knowing you're making a continuous impact on the causes you care about.
- 2 You can increase the effect you're having with subsequent donations to your account, which can be made at anytime of a minimum of \$500.
- 3 Donated funds are invested in your choice of [eligible mutual funds](#) to help grow tax free, allowing a larger grant to be provided to the charities you support.
- 4 You receive a tax receipt for your donations to the account. Your receipts can be included in your annual tax return for a credit of up to 53%.

Your account can continue to grow in the future, allowing you to establish a family legacy of giving back. By naming successors on the account, your family can provide support for your chosen cause through future generations.

What motivates Canadians to give back?

The leading reason for donating is a desire to help those in need and a sense that it is the right thing to do. In addition, people are motivated to give to a cause that may have directly affected or benefited their family or someone they cared about. Others are influenced by religious beliefs and family traditions. Canadians also do not have time to actively give back through volunteer work and therefore would rather donate to fulfill the need of giving back.

Donor motivations



Source: What Canadian Donors Want, Ipsos, Public Affairs, 2015



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Canadians want to give back to their communities and the causes they hold dear. With the Mackenzie Charitable Giving Program, you can help them achieve their charitable goals in a tax-efficient manner that can produce a real impact and build a family legacy of making a difference to the causes they value.

For more information:

- [Visit the Mackenzie Charitable Giving Program site](#)
- [Download the Advisor Guide](#)
- [Download the Investor Guide](#)

Our Tax & Estate Planning Group can help you identify opportunities to start the charitable giving conversation with clients and prospective clients. [Learn more about the team and our advisor services.](#)

Commissions, trailing commissions, management fees and expenses all may be associated with mutual funds. A charitable administration fee and charitable operating expenses will also apply. Please read the prospectus before investing and the program guide before donating. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. The information is general in nature and is not intended to be professional tax advice. Donations should not be made for tax considerations alone. Each donor's situation is unique and advice should be received from a financial advisor.

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