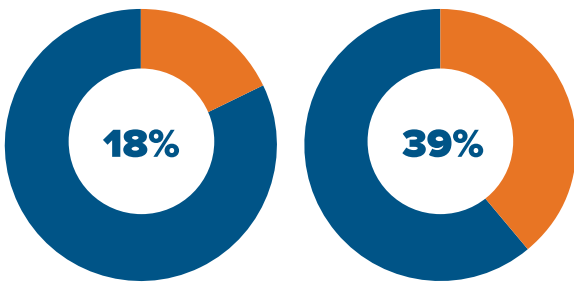


Why a donor-advised fund may be right for you

Did you know that a donor-advised fund can help you make regular giving a part of your financial plan?

A donor-advised fund (DAF) is a Canada Revenue Agency-approved charitable giving option that has become one of the most efficient ways for individuals, families, and corporations to manage their philanthropy.



Canadian Charitable Giving Pulse Check survey

In the recent Mackenzie Investments Charitable Giving Survey, we discovered that only 18% of Canadians are aware of donor-advised funds. However, once it's explained to them, 39% would consider using one for their charitable giving.

Here are five reasons why a donor-advised fund may be right for you:

- 1 Low-cost alternative:** A donor-advised program is a convenient and low-cost alternative to establishing and running your own private foundation. You can make recommendations to direct funds from your account to the charity or charities of your choice and the Foundation will take care of the administration.
- 2 Tax efficiency:** You receive an immediate donation tax receipt for your ongoing long-term support of your favourite charities. No capital gains taxes are realized on gifts of appreciated publicly-traded stocks or mutual funds/ETFs. Plus, you can make use of the donation tax credit in the current year or any of the following five years. Find out how planned giving can reduce your tax liabilities with our online calculators at mackenzieinvestments.com/giving.
- 3 Convenience:** You can continue to work with your current financial advisor to oversee your foundation account. The Mackenzie Charitable Giving Program simplifies your charitable giving experience by handling all of the administrative tasks (i.e., record-keeping, grant reporting and tax receipts) for you.
- 4 Flexibility:** You have flexibility in the choice of investments in your charitable giving account, how much in grant money flows to your charities each year and which charities you wish to support.
- 5 Leave a lasting legacy:** You can give your account the name of your choice. You could name it after a family member, a lost loved one, or a cause you champion. Every time a grant is sent to a charity, the account's name is cited as the source of the gift. You can also choose to give anonymously.



The Mackenzie Charitable Giving Program makes giving more convenient and powerful, helping investors give back, grant to charities, and grow their impact now and in the future. It also helps charities. Through the good and the bad times, your charities receive a stream of funds without fund-raising themselves.

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



Giving starts with a conversation

Visit mackenzieinvestments.com/giving or contact your financial advisor to learn more about the Mackenzie Charitable Giving Program.

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.

This should not be construed as legal, tax or accounting advice. This material has been prepared for information purposes only. The tax information provided in this document is general in nature and each client should consult with their own tax advisor, accountant and lawyer before pursuing any strategy described herein as each client's individual circumstances are unique. We have endeavored to ensure the accuracy of the information provided at the time that it was written, however, should the information in this document be incorrect or incomplete or should the law or its interpretation change after the date of this document, the advice provided may be incorrect or inappropriate. There should be no expectation that the information will be updated, supplemented or revised whether as a result of new information, changing circumstances, future events or otherwise. We are not responsible for errors contained in this document or to anyone who relies on the information contained in this document. Please consult your own legal and tax advisor.

Mackenzie developed the Mackenzie Charitable Giving Program with the Strategic Charitable Giving Foundation, a registered Canadian charity. Donations under the program are irrevocable and vest with the Foundation. The information is general in nature and is not intended to be professional tax advice. Each donor's situation is unique, and advice should be received from a financial advisor. Please read the program guide for complete program details, including fees and expenses, before donating.