



MACKENZIE
Investments

Investor Guide

Mackenzie Charitable Giving Program



Establish your legacy

Maximize your charitable donations and your impact in your community through the Mackenzie Charitable Giving Program.



The Mackenzie Charitable Giving Program Leave Your Mark

How do you define success?

To many investors, success is about more than material possessions. It is about having the ability to make a difference and leave a lasting legacy.

A contribution to a registered Canadian charity can put food on the table for families in need, give underprivileged children new opportunities and help those with disabilities lead a richer life. Whatever your inspiration, charitable giving is about taking action to have a meaningful impact.

The same desire to contribute to the greater good lies at the core of Mackenzie Investments. It is what drives us to be active participants in the community and led us to establish the Mackenzie Charitable Giving Program in 2006.

Only 6% of Canadians have discussed charitable giving with a financial advisor, but it has never been easier to donate to charity.* The Mackenzie Charitable Giving Program is designed to make giving a regular part of your overall financial plan. Simple and convenient, this solution offers immediate tax benefits and the ability to support your favourite charities now and into the future.

Mackenzie Charitable Giving Program by the Numbers:

- Founded in 2006
- \$94.6 million in donations received since inception
- 1408 charities supported
- \$19.4 million in grants paid out to charities and institutions

Source: Mackenzie Investments as of June 30, 2016.

*Source: Leger, August 2016.



A Meaningful Way to Give

The Benefits of the Mackenzie Charitable Giving Program

Low Cost Alternative

Compared with the expense of setting up and maintaining your own private foundation, the Mackenzie Charitable Giving Program is an inexpensive way to manage a sizeable gift.

Flexibility

You are able to recommend grants to any number of charities or other institutions each year, with minimum grants of \$500. Mackenzie ensures eligibility requirements are met and distributes the cheques on behalf of your account.

Tax Efficiency

You will receive an immediate tax receipt for your donation. No capital gains taxes are realized on gifts of long-term appreciated publicly-listed stocks, bonds and mutual funds. You can make use of the tax credit in the current year or any of the following five years.

Convenience

The Program consolidates your charitable giving by handling administration tasks (i.e. record-keeping, grant reporting and tax receipts) for your account.

How it Works

The Mackenzie Charitable Giving Program is offered through the Strategic Charitable Giving Foundation, a registered Canadian charity. Donations under the program are irrevocable and vest with the charity. A charitable administration fee, annual operating expenses and fees on eligible investments will apply. Please refer to the Program Guide for more information.

MINIMUM DONATION	\$25,000
WHAT CAN BE DONATED	Cash, stocks, bonds, mutual funds, insurance or segregated funds
ELIGIBLE CAUSES	Canadian registered charities and other institutions as prescribed by Income Tax Act regulations
GRANTS AND TAX RECEIPTS ADMINISTERED BY	Mackenzie Investments on behalf of the Strategic Charitable Giving Foundation

Start the Charitable Giving Conversation

Your donations can have a significant impact on your community. 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.

The content of this brochure (including facts, views, opinions, recommendations, descriptions of or references to, products or securities) is not to be used or construed as investment advice, as an offer to sell or the solicitation of an offer to buy, or an endorsement, recommendation or sponsorship of any entity or security cited. Although we endeavour to ensure its accuracy and completeness, we assume no responsibility for any reliance upon it. This should not be construed to be legal or tax advice, as each client's situation is different. 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.

The information contained herein is based on current marginal tax rates and is intended for illustration purposes only. While care is taken in the preparation of this document, no warranty is made as to the accuracy or applicability in any particular case. Furthermore, this calculator may not capture all tax benefits available in provinces that have a surtax. The information provided is general in nature and is intended to highlight various tax planning issues. This information should not be relied upon or construed as legal or tax advice. Readers should consult with their advisors, lawyer and tax professionals for advice before employing any of these strategies.

GENERAL INQUIRIES

For all of your general inquiries or account information, please call:

ENGLISH	1-800-387-0614
BILINGUAL	1-800-387-0615
ASIAN INVESTOR SERVICES	1-888-465-1668
TTY	1-855-325-7030
FAX	1-866-766-6623
E-MAIL	service@mackenzieinvestments.com
WEB	mackenzieinvestments.com

Find fund and account information online at Mackenzie Investments' secure InvestorAccess.

Visit mackenzieinvestments.com for more information.

To Help You Meet Your Goals

Charitable Giving Program – Registered Disability Savings Plan – Registered Education Savings Plan
Registered Retirement Savings Plan – Registered Retirement Income Fund – Tax Free Savings Account