



**MACKENZIE**  
Investments

<<Date>>

<<Client Name>>

<<Client Address>>

<<Client Address>> << Client Postal code >>

**Re: Registered Disability Savings Plan (RDSP): <<Account Number>>**

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Hello,

We're writing to you because Canada Revenue Agency (CRA) recently contacted us about your Registered Disability Savings Plan (RDSP) as the beneficiary's disability tax credit (DTC) was never confirmed. Since this is a requirement to establish an RDSP, CRA has informed us that the plan must be closed.

**It is very important that you review the following with your financial advisor at your earliest convenience to decide what option is best suited to your investment objectives:**

- Transfer the plan to another Mackenzie Investment account in the name of the beneficiary, or
- Close the plan and a cheque will be issued to the beneficiary.

If we do not receive a response by <<date>>, the RDSP will be closed and any capital and/or income remaining in the RDSP will be paid to the beneficiary as a disability assistance payment (DAP). A T4A (Québec Relevé 1) tax slip will be issued to the beneficiary for the taxable portion of the DAP.

If you have any questions regarding this matter, please contact your financial advisor or our Client Relations team at 1-800-387-0614, option 3.

Thank you for continuing to make Mackenzie Investments a part of your long-term investment plans.

Sincerely,

MACKENZIE INVESTMENTS

Jessa Wilson  
Assistant Vice President, Client Relations