



<<Date>>

<<Client Name>>

<<Client Address>>

<<Client Address>>

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

**Re: Registered Disability Savings Plan: <<Account Number>>**

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Hello,

We're writing because the Canada Revenue Agency has advised us to deregister your Registered Disability Savings Plan (RDSP), which no longer meets the conditions described in the Income Tax Act. When a plan is deregistered, any Assistance Holdback Amount is repaid to the government and can result in the closure of the account.

We recommend contacting your financial advisor as soon as possible to review the following options and decide which one is best suited to your investment objectives:

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

If we don't hear from you 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.

MACKENZIE INVESTMENTS

A handwritten signature in cursive script that reads "Jessa Wilson".

Jessa Wilson  
Assistant Vice President, Client Relations