



<<Date>>

«Client_Name»

«Client_Address_1»

«Client_Address_2»

«Client_postal_code»

Re: Registered Disability Savings Plan (RDSP): <<Account Number>> Loss of eligibility for the Disability Tax Credit

Hello,

We're reaching out because the Canada Revenue Agency (CRA) recently contacted us about your Registered Disability Savings Plan (RDSP). The CRA has advised that the beneficiary has not been confirmed eligible for the Disability Tax Credit (DTC).

Why is this important?

- To contribute to an RDSP and apply for grant/bond for any given year, the RDSP beneficiary must be approved for the DTC for that year.
- Until the CRA confirms that the beneficiary is eligible for the DTC, you won't be able to make contributions to the RDSP, including pre-authorized contribution plans.

What are my next steps?

- If the beneficiary is **currently eligible for the DTC**, and you have received confirmation from the CRA, please provide a copy of the letter to your financial advisor.
- If the beneficiary **might still be eligible for the DTC**, you can reapply for the DTC by submitting the Disability Tax Certificate form (T2201) to the CRA or using their new digital form.
 - Both the PDF application and digital form can be accessed by going to www.canada.ca and selecting Taxes > Tax credits and benefits for individuals > Disability tax credit (DTC).

Please note that if the beneficiary is no longer eligible to apply for the DTC, the RDSP can remain open, but no further contributions can be made.

We encourage you to contact your financial advisor as soon as possible to discuss these options and complete any forms that might be needed. You can also reach out to our Client Relations team with questions at 1-800-387-0614 (option 3 - RDSP).

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

Sincerely,
MACKENZIE INVESTMENTS

A handwritten signature in cursive script that reads "Jessa Wilson". The signature is written in black ink and is positioned to the left of the typed name.

Jessa Wilson
Assistant Vice President, Client Relations