MACKENZIE
Investments

<date>

<Title> <First_Name> <Last_Name>
<Street_Address>
<City>, <Province>
<Postal_Code>

Re: Mackenzie Investments TFSA – Needs your attention by <<date>>: <<Account number>>

Dear [Client name],

We're reaching out to ask that you check some information so we can register your Tax-Free Savings Account (TFSA) with the Canada Revenue Agency (CRA), even though it's no longer active. When we applied to register it, the application was rejected because some of the information you provided doesn't match the CRA's records.

It's easy to resolve this issue – just contact us before <<date>> to validate your information.

What information should I check?

- Your social insurance number (SIN)
- Your date of birth
- Your surname

What are my next steps?

- Please call us at 1-800-387-0614 to validate your SIN, surname and date of birth. Be sure to have your official documentation on hand so we can compare it against our records.
- Our Client Relations team can update your information and we'll resubmit your TFSA for registration.

What if the information on file with Mackenzie is correct?

- In that case, you'll need to apply to the Social Insurance Registry to have your information updated.
- Once CRA has made the correction, contact our Client Relations team to discuss next steps.
    - SIN inquiries: 1-866-274-6627
    - Online application: https://www.canada.ca/en/employment-social-development/services/sin/apply.html

Why is this so important?

180 Queen Street West, Toronto, ON M5V 3K1 T 416-922-5322 1-888-653-7070 E service@mackenzieinvestments.com
mackenzieinvestments.com

- Even though your TFSA is now closed, it still must be registered with the CRA. If the account can’t be registered, we may have to cancel your TFSA and issue tax slips for any income that was earned within the plan.
- This could have tax consequences for you, such as interest, penalties, or a requirement to file an amendment to your tax return. It could also affect any other TFSAs you might hold.

We’re here to help resolve this issue and answer any questions you may have. Please contact us by **<<date>>** so we can ensure your TFSA is successfully registered and granted its tax-sheltered status.

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

Sincerely,

MACKENZIE INVESTMENTS

Jessa Wilson
Assistant Vice President, Client Relations