



**MACKENZIE**  
Investments

<date>  
<Title> <First\_Name> <Last\_Name>  
<Street\_Address>  
<City>, <Province>  
<Postal\_Code>

### **Delivery of your Annual Information Statement (AIS) – needs your attention**

Hello,

We're reaching out for some information that will assist in delivering an Annual Information Statement (AIS) for your account(s).

#### **What's an AIS?**

- This statement is generated annually to assist with your U.S. tax reporting.
- It provides information for your accounts, allowing you to report the funds in your accounts as Qualifying Electing Funds for U.S. federal income tax purposes.

#### **What do I need to do?**

- To help ensure we deliver the AIS to you before the filing deadline, please email [operationalservicing@mackenzieinvestments.com](mailto:operationalservicing@mackenzieinvestments.com) to provide your email address or to update an existing email address on file. This allows us to securely send an electronic version of your AIS and avoid mailing delays.
  - The email address currently on file for you is <<insert email address>>
- Please be sure to add the Mackenzie email address above as a trusted address to prevent the message from being considered spam when it's sent in early April.

#### **Why is this important?**

- If we don't have an email address on file, we'll mail the AIS to you via Canada Post, but we can't guarantee delivery prior to the US filing deadline.

#### **Questions?**

If you have any questions, please contact your financial advisor or our Client Relations team at 1-800-387-0614. Thank you for continuing to make Mackenzie Investments a part of your long-term investment plans.

Sincerely,

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

Jessa Wilson  
Mackenzie Investments  
Assistant Vice President, Client Relations