<<Date>>

<<Client Name>>
<<Address>>
<<Address>>
<<Address>>

Re: Needs you attention: beneficiary and holder validation for RDSP # <<acct#>>

Dear <<Client>>,

We're reaching out to ask that you check some information so we can register your Registered Disability Savings Plan (RDSP) with Employment and Social Development Canada (ESDC). When we applied to register it, the application was rejected because some of the personal information you provided doesn't match the Social Insurance Registry's (SIR) records.

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

What information do I need to check?

If the status below is "failed," it means the information on file with us doesn't match the SIR's records.

Beneficiary information	**Validation by ESDC (passed/failed)**
First name	
Last name	
Date of birth	
Gender	
Social Insurance Number (SIN)	

What do I need to do exactly?

Call us at 1-800-387-0614 to validate the information with a "failed" status. Be sure to have your official documentation on hand so we can compare it against our records.

- If the information on file with us is **incorrect**, please contact your financial advisor or our Client Relations team at 1-800-387-0614 to make the appropriate updates to your account.
- If the information on file with us is **correct**, you'll need to submit a SIN application to have your information updated. You can contact the Social Insurance Registry at 1-866-274-6627 or submit an application online at www.canada.ca/en.
    - Once the SIR has made the correction, please contact our Client Relations team for next steps.

Why is this important?

- RDSPs need to be registered through ESDC to qualify for program incentives.
- Accounts that aren't registered successfully will experience interruptions in payments, so it's important that you reach out at your earliest convenience to confirm your personal information.

Once the issue is resolved, we'll re-submit your application to ESDC to ensure that your RDSP is eligible to receive grants and bonds from the government.

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

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

Sincerely,
MACKENZIE INVESTMENTS

Jessa Wilson

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Assistant Vice President, Client Relations

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