

A STRATEGIC APPROACH TO CHARITABLE GIVING

Mackenzie Charitable Giving Fund

Looking for a charitable giving program that helps you minimize your tax liability and make charitable giving easier? The Mackenzie Charitable Giving Fund is a donor-advised giving program designed to provide you with a more focused and strategic approach to giving.

With the Mackenzie Charitable Giving Fund, you can have the advantages of a private foundation without the up-front costs and administrative responsibilities. It is a simple, convenient and smart way of giving that combines immediate tax benefits with the ability to support your favourite charities now and in the future.

Donor opens account and names fund

Initial donation of \$25,000 or more

Source: cash, securities, insurance

Donor receives charitable receipt for the value of the donation



Donation held within charitable foundation

Donation is invested and can potentially grow

Donations managed by Mackenzie Investments, aiming for long-term growth and income

Donations and grants administered by Mackenzie Investments on behalf of Strategic Charitable Giving Foundation



Donor advises on grants

Donor can recommend any number of registered Canadian charities or eligible institutions



Selection may be changed anytime (\$500 minimum grant)

Advisor and donor notified each year of amount available for granting based on selected distribution rate

Benefits of the Mackenzie Charitable Giving Fund

Impact

The Mackenzie Charitable Giving Fund program allows you to shape and define your legacy. Whatever your interest, whatever your passion, you can make a difference. Sometimes, a wellplaced gift of a few hundred dollars can make all the difference to a charity in the delivery of its programs and services. You don't have to be wealthy to take action.

Continuity

The Mackenzie Charitable Giving Fund provides you with a legacy of giving. By involving your family in your fund, you are passing on your most essential values – the importance of giving back to your community and helping those less fortunate.

Trust

Trust is at the core of the Mackenzie Investments name. We are committed to earning and keeping your trust by holding ourselves to the highest standards of professional practice.

Flexibility

The Mackenzie Charitable Giving Fund gives you the flexibility that you need to:

- Support charities close to home and across the country
- Use a variety of different assets – cash, stocks, bonds, mutual funds, segregated funds, insurance – to support your charitable giving
- Involve your family in your philanthropic decision-making, now and in the future

Service

Mackenzie Investments is committed to giving you, the donor, the service you need to achieve all of your philanthropic objectives. Your fund is professionally managed and administered.

The tax advantages of the Mackenzie Charitable Giving Fund

Maximizing Your Tax Savings

- Immediate donation receipt generates tax credits
- Generally, no capital gains tax on gifts of appreciated securities (publicly-listed stocks, bonds and mutual funds)

Fund features

Minimum initial gift	\$25,000
Additional donations	\$5,000
Investment options	Eligible investments, professionally managed by Mackenzie Investments
Choice	Remain anonymous or be acknowledged for grant recommendations

The Mackenzie Charitable Giving Fund is designated to help you give in your own way.

Please call your financial advisor today for more information or visit mackenzieinvestments.com/giving

Mackenzie Investments developed the Mackenzie Charitable Giving Fund program with the Strategic Charitable Giving Foundation, a registered Canadian charity. Donations under the program are irrevocable and vest with the Foundation. The information is general in nature and is not intended to be professional tax advice. Each donor's situation is unique and advice should be received from a financial advisor. Please read the program guide for complete program details, including fees and expenses, before donating.