

Give + Grant + Grow

Mackenzie Charitable Giving Program

Made easy through your financial plan.



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Canadians care.

From supporting the arts, to funding local food banks, giving back is a way of life for many. They champion the causes and communities they care about. They are also keenly aware of an indisputable truth: philanthropy is not a short-term commitment. In order to get at the root causes of a problem, you need to be in it for the long run.

That's something we understand, too. Mackenzie has a history and a culture of giving back. It's in our DNA. That's why we set up the Mackenzie Charitable Giving Program in 2006, to help investors give and make a lasting impact. Since the beginning, we've helped donors support over 3,000 charities through our Charitable Giving Program and have strived to make a meaningful difference in the communities we work and live.

Charitable giving made easy through your financial plan

At Mackenzie we believe in the power of giving. Our Charitable Giving Program integrates giving into an investor's overall financial plan while offering immediate tax benefits. We've made things simple and convenient so investors can focus on what matters most – the causes they care about.

Mackenzie Charitable Giving Program by the numbers:

\$286.9

million in
donations

over

3,000

charities
supported

\$110

million in grants
paid out to charities
and institutions

**Source: Mackenzie Investments as of June 30, 2024.

Give well.

The Mackenzie Charitable Giving Program makes giving more convenient and powerful, helping investors give back, grant to charities, and grow their impact now and in the future.

- 1 Give back**
Through the Strategic Charitable Giving Foundation, donors can give back to those in need and support the charities they truly care about in a simple and convenient way.
- 2 Grant charities**
Donors select the charities and causes they want to support, grant them the funding they need to make a real difference, and leave a legacy of giving.
- 3 Grow impact**
Donors can sustain and even increase giving over time, as the money grows tax-free, helping charities make the type of impact that changes lives.



Did you know?

The Mackenzie Charitable Giving Program is offered through the Strategic Charitable Giving Foundation, a registered Canadian charity. It manages charitable giving funds, known as donor-advised funds. The Foundation receives and maintains donated funds, which are invested, and then granted to recommended charities.*

*Donations under the program are irrevocable and vest with the charity. Annual operating expenses specific to a donor's account may apply in certain circumstances. Please see the Program Guide for more information.

Give back.

The decision to donate to charity can demand a great deal of your time, energy, and resources. The Mackenzie Charitable Giving Program was designed to make regular giving a part of an overall financial plan. Simple and convenient, it helps you support the causes you care about in a strategic and tax-efficient way.

Benefits

1 Convenient

We consolidate your charitable giving by handling all the administrative tasks, distributing grant cheques to charities recommended by you, issuing statements and tax receipts.

2 Tax efficient

You receive an immediate tax receipt for your donation. No capital gains taxes are realized on gifts of long-term appreciated publicly-listed stocks or mutual funds. You can make use of the tax credit in the current year or any of the following five years.



Give

- Simple, convenient way to include charitable giving in your overall financial plan.
- Receive immediate charitable tax receipt for the value of your donation.



Grant

- You select the charities you want to give to, we issue the grant cheques, and send you bi-annual reporting on your account.
- Enjoy the benefits of a private foundation without the costs, time commitment and administrative hassle.



Grow

- Sustain giving over the long term and make a lasting impact.
- Set up recurring donations.
- Donated funds are invested in the eligible Mackenzie mutual fund of your choice and grow tax-free.
- Investment growth allows you to grant even more to the charities you care about.
- Establish a legacy of giving.
- Name account successors.



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Grant to charities.

The Mackenzie Charitable Giving Program is offered through the Strategic Charitable Giving Foundation, a registered Canadian charity. You receive all the benefits of a private foundation, without the cost, time commitment and administrative hassle.

How it works

1 Open and name your account

First, you open an account. You can name your account after your family, a lost loved one, or a cause you champion. The choice is yours.

2 Donate

Make an initial \$10,000 minimum contribution. You can donate cash, publicly listed stocks, mutual funds, insurance or segregated funds. Contribute as frequently and as much as you wish. Subsequent donations may be made at a minimum of \$500 per donation.

3 Choose your charities

Choose the charities you'd like to support. You can grant to Canadian registered charities (other than private foundations) and any other institutions as prescribed by Income Tax Act regulations.

4 Make grants

You can recommend grants to any number of charities or institutions each year, with minimum grants of \$250. The Strategic Charitable Giving Foundation will issue the grant cheques.

5 Receive statements and tax receipts

We take care of all record-keeping, issuing statements and tax receipts.

**Name your account
after your family, a lost
loved one, or a cause
you champion.**

The choice is yours.



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Grow impact.

The Mackenzie Charitable Giving Program was created to help investors maximize charitable donations and make a lasting impact. We help you sustain giving over the long-term and enable the charities you support to make a meaningful difference.

Benefits

1 Recurring donations

Set up recurring donations and give a pre-determined grant to the causes you care about.

2 Make subsequent donations

Make subsequent donations at any time. (Minimum \$500 per donation).

3 Grant more as your contribution grows

Donated funds are invested in your chosen eligible Mackenzie mutual fund, and they grow tax-free, allowing you to grant even more to the charities you support.

4 Establish a legacy of giving

Your account can continue to generate growth in the future, allowing you to establish a legacy of charitable giving according to your wishes.

5 Name account successors

Create a future plan for charitable giving. Name your children or other trusted friends and family members as account successors, so they can make granting and investment recommendations for generations to come.

Establish a legacy of giving that continues for generations to come.



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Giving starts with a conversation

Visit mackenzieinvestments.com/giving or contact your financial advisor to learn more about the Mackenzie Charitable Giving Program.

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Mackenzie developed the Mackenzie Charitable Giving 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.

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Give



Grant



Grow

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That's better together

