



**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],

Earlier this year we sent letters asking that you help us to properly register your Tax-Free Savings Account (TFSA). We're reaching out one last time for your assistance.

We need to confirm that the personal information on file for you is correct. We've been unable to register your TFSA with the Canada Revenue Agency (CRA) because some of our information (social insurance number, date of birth or surname) doesn't match the CRA's records.

**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?**

- If the account can't be registered with the CRA, your TFSA will be deregistered. Tax slips will be issued for any income that was earned within the plan.

- Your account assets will be transferred to an existing non-registered account, if you have one, or otherwise redeemed and sent to you by cheque.
- This could have tax consequences for you, such as interest, penalties or 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.

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

Sincerely,

MACKENZIE INVESTMENTS

A handwritten signature in black ink that reads "Jessa Wilson". The signature is written in a cursive, flowing style.

Jessa Wilson  
Assistant Vice President, Client Relations