<<Date>>

<< Investor Name>>
<< Investor Address>>
<< Investor Address>>
<< Investor 2>> << Postal code >>

Needs your attention - confirm your eligibility for non-resident tax reduction by March 29: Account # <<account #>>

Dear <<Investor name>>,

We're reaching out because you're currently designated as a non-resident for Canadian tax purposes, and we need to confirm your eligibility for tax treaty benefits.

Why is this important?

- If you live in a country that has a bilateral tax agreement with Canada, you may be eligible for a reduced rate of withholding tax on income earned in a non-registered investment account or periodic income payments made from an income plan.
- Clients who reside in Australia can receive a reduced rate on payments made from an RRSP.

What do I need to do?

- It's simple – just complete and submit form NR301 (Declaration of eligibility for benefits (reduced tax) under a tax treaty for a non-resident person).
- You can find the form on the Canada Revenue Agency (CRA) website: https://www.canada.ca/en/revenue-agency/services/forms-publications/forms/nr301.html

Under CRA guidelines, this form must be completed **every three years** or when a change in circumstances affects any of the information on a previously completed form.

Where do I send the form?

You can submit the completed NR301 form to us by:

- faxing to 1-866-766-6623
- scanning a copy and emailing to operationalservicing@mackenzieinvestments.com
- mailing to the address below

If the account holder is an entity rather than an individual, please use form NR302 or NR303 as applicable. Your financial advisor can provide guidance on which form is appropriate for your account type(s).

Please ensure your account number(s) is clearly indicated on the form. For joint accounts, please submit a separate form for each account holder.

How long do I have to submit the form?

- To qualify for a reduction, provide us with a completed form by **March 29, 2024**
- If the form isn't received by that date, you'll automatically receive the higher default withholding tax rate in 2024.

If you have any questions regarding these forms, please contact your financial advisor or Client Relations at 1-800-387-0614.

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

Sincerely,

MACKENZIE INVESTMENTS

Jessa Wilson

Jessa Wilson
Assistant Vice President, Client Relations