



MACKENZIE  
FUTUREPATH

# Your path to the future starts **here**

WELCOME TO MACKENZIE FUTUREPATH FUNDS AND PORTFOLIOS

Be Invested.



## Together, Mackenzie Investments and Primerica have created a new path to your success

For over 45 years, Primerica representatives have been dedicated to empowering families to take control of their financial future. Through financial education and access to investment solutions, you help Canadians make informed choices with confidence.

In June 2022, Mackenzie FuturePath joined the Primerica family with a powerful suite of investments, created just for you.

Every day we'll do whatever it takes to help you grow your business and secure financial independence for your clients.



# Welcome to Mackenzie FuturePath

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**Delivering 28 Mackenzie FuturePath mutual funds created just for Primerica, and available through TurboApps. All designed to meet the unique needs of your clients.**

**You'll have access to a full range of investment solutions from one of Canada's leading asset management firms, with world-class managers across all investment categories.**

## ABOUT US

# Why invest with us.



Since 1967, Mackenzie has been helping Canadian families reach their financial goals by providing access to world-class investment opportunities and award-winning managers.

### WE BELIEVE IN:

#### Strategic partnership.

Partnering with representatives to help your clients reach their full potential.

#### Performance.

Delivering innovative, performance-driven investment solutions for all investor types.

#### Sustainability.

Investing responsibly for a sustainable future.

#### Simplicity.

Making investments easier to understand.



We believe that when we work **together in true partnership**, we create the greatest impact for **everyone**.

## At a glance



**50+** Years of helping Canadians

**16** Investment boutiques

**175** Investment professionals

**1M+** Clients

**\$220.2B\*** Assets under management

\* As of February 28, 2025.

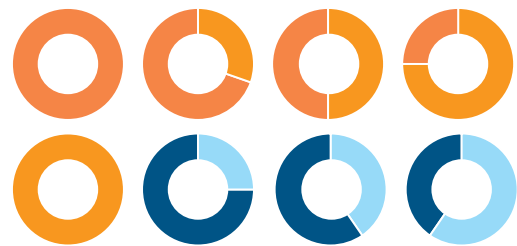


Global offices across Canada, Boston, Dublin, London, Hong Kong and Beijing

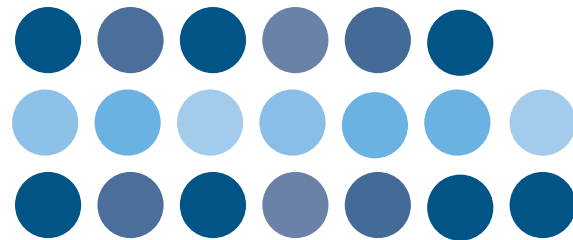
# MACKENZIE FUTUREPATH

## 28 new ways to reach your financial destination.

8 managed portfolios for easy, all-in-one solutions



20 funds for building one-of-a-kind portfolios



### Why Mackenzie FuturePath?

1

#### EXPERTISE

Award-winning managers give you an investing advantage.

2

#### CHOICE

A full suite of portfolios and funds to match every objective.

3

#### EASE

All-in-one portfolios to simplify your life.

The FuturePath fund family, created just for Primerica, offers a breadth of high-quality products and managers designed for any environment, offering exposure to a range of asset classes and investment styles.

FuturePath is designed to give Canadians the choices and expertise they need to get on the path to a more secure financial future. There's something for everyone — families, business owners, professionals and retirees — starting with an initial investment as low as \$500, and investment plans as low as \$25 a month.

Portfolios and funds powered by world-class managers and sub-advisors.



Bluewater Team • Betterworld Team • Multi-Asset Strategies Team • Fixed Income Team  
North American Equity & Income Team • Global Equity & Income Team • Global Quantitative Equity Team



## MACKENZIE FUTUREPATH PORTFOLIOS

# Make investing easy with **eight** all-in-one portfolios.

# 5

**MULTI-ASSET  
PORTFOLIOS**

+

# 3

**MONTHLY INCOME  
PORTFOLIOS**

What if you could get a professionally constructed and managed portfolio in **one simple package**? With Mackenzie FuturePath portfolios, you get all the benefits:



Diversified mix of asset classes, managers, countries, industries and investment styles for performance potential no matter what the future brings.

Constructed using a combination of mutual funds, ETFs and options.

Professionally managed by Mackenzie Investments plus external partners.

Rebalancing, monitoring, administration and reporting included.

Sophisticated portfolio construction to optimize return for risk.

Options to suit a variety of investor goals, profiles and life stages, including retirement income solutions.

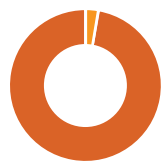
## Multi-Asset Portfolios

# Simple on the outside, complex and hard-working on the inside.

Our hands-free investment solutions may look simple. But they are, in fact, packed with complex strategies and advanced expertise. Designed and constructed by Mackenzie's multi-asset strategy team, each portfolio contains multiple asset classes, geographies, investment managers, strategies and styles, combined for optimal performance potential. We offer five models that cater to a variety of investor profiles, depending on their specific needs, priorities, sensitivity to risk and timeline.

### CONSERVATIVE

97% Fixed income  
3% Equities



Mackenzie FuturePath  
**Canadian Fixed Income Portfolio**

For investors who seek reliable income from Canadian bonds and preservation of capital.

60% Fixed income  
40% Equities



Mackenzie FuturePath  
**Global Fixed Income Balanced Portfolio**

For investors who seek reliable income with some growth potential from global stocks.

40% Fixed income  
60% Equities



Mackenzie FuturePath  
**Global Neutral Balanced Portfolio**

For investors who seek to combine the stability of bonds with the growth potential of stocks.

20% Fixed income  
80% Equities



Mackenzie FuturePath  
**Global Equity Balanced Portfolio**

For investors who seek to achieve growth from global stocks with less volatility.

100% Equities



Mackenzie FuturePath  
**Global Equity Portfolio**

For investors who seek growth by investing in a broad range of global stock opportunities.

Note: Target weightings are for illustrative purposes only. Actual percentage weightings may differ. Please read the prospectus for full details before investing.

## Monthly Income Portfolios

# Three ways to spend a well-earned retirement.

For investors who need monthly cash flow in retirement, we manage their investments while balancing three very important objectives.

- 1 MONTHLY INCOME** Receive a 5% fixed rate monthly distribution from dividends, bond interest, capital gains and return of capital when needed.
- 2 GROWTH** Capture the higher return potential of equities to increase the longevity of retirement assets.
- 3 SAFETY** Rely on sophisticated strategies aimed at protecting capital during market downturns.

### CONSERVATIVE

65% Fixed income  
35% Equities



Mackenzie FuturePath  
**Monthly Income Conservative Portfolio**

For investors who seek predictable cash flow with risk management.

45% Fixed income  
55% Equities



Mackenzie FuturePath  
**Monthly Income Balanced Portfolio**

For investors who seek predictable cash flow and some long-term growth with less downside.

15% Fixed income  
85% Equities



Mackenzie FuturePath  
**Monthly Income Growth Portfolio**

For investors who seek asset growth with predictable cash flow.

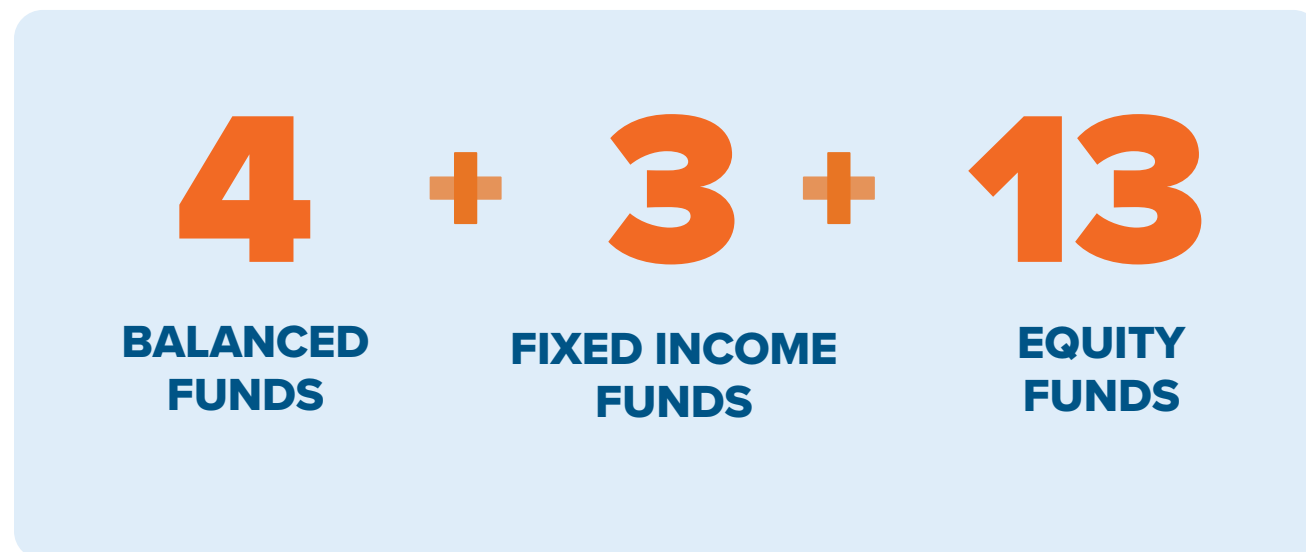
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**The path  
to financial  
independence  
starts here**

## MACKENZIE FUTUREPATH FUNDS

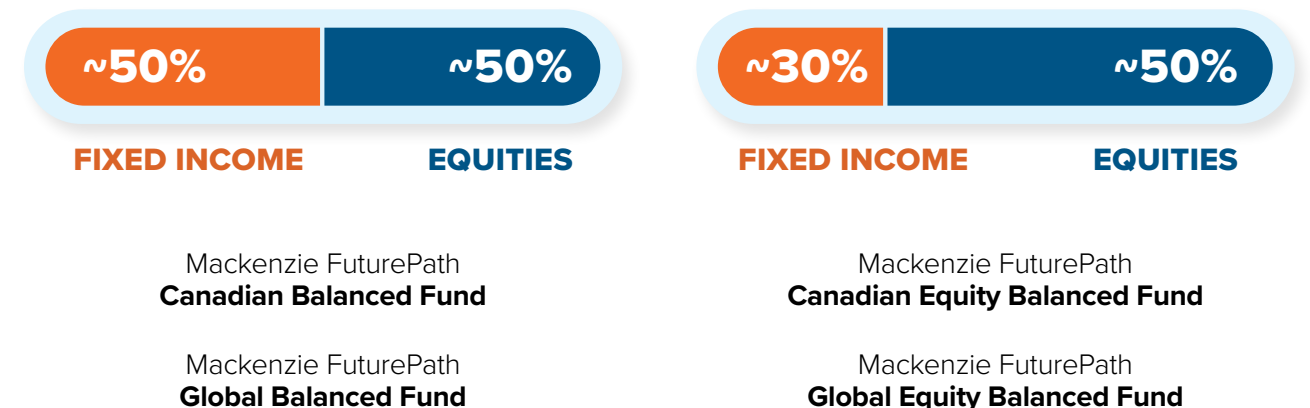
# Build just the portfolio you need with **20** unique funds



### Balanced funds

## Stocks and bonds together, for a solid foundation

A well-diversified, balanced fund can be an ideal building block or foundation for a portfolio. With a solid starting point, you can then customize the portfolio, adding funds to emphasize other markets, asset classes or investment styles, while being confident that you have all the bases covered. Balanced funds combine Mackenzie's strongest equity boutiques with our fixed income boutique.



Note: Target weightings are for illustrative purposes only. Actual percentage weightings may differ. Please read the prospectus for full details before investing.

## Equity funds

# Share in the wealth of leading companies

What if you could give your clients the chance to “own” a company like Apple or Nike or CN Rail? Investing in equity funds gives individuals the opportunity to have a small ownership stake in large companies and benefit from their success.

When a company's shares increase in value, so does your client's investment. Over time, stocks have shown strong growth potential when held for the long-term. And through mutual funds, every dollar invested buys a piece of every stock in the portfolio. So each investor becomes a part-owner of many companies, which is safer than having all of their money riding on a few stocks.

Mackenzie FuturePath gives you access to the specialized expertise of a wide range of renowned stock pickers, both inside and outside of Mackenzie. Choose from equity funds managed by Mackenzie's own Bluewater, Betterworld, North American Equity & Income, Global Equity & Income, and Global Quantitative Equity boutiques, as well as managers such as T. Rowe Price, 1832 Asset Management and Brandywine.

## Your choice of 13 equity funds

### CANADA

#### Mackenzie FuturePath

Canadian Core Fund

Canadian Dividend Fund

Canadian Growth Fund

Canadian Sustainable Equity Fund

### UNITED STATES

#### Mackenzie FuturePath

US All Cap Growth Fund

US Core Fund

USD US Core Fund

US Growth Fund

US Value Fund

### GLOBAL

#### Mackenzie FuturePath

Global Core Fund

Global Growth Fund

Global Value Fund

Shariah Global Equity Fund

## What's your investing style?

### VALUE

#### GEMS IN THE ROUGH

Value funds seek high-quality companies that are thought to be priced below what they are really worth.

### CORE

#### A SOLID CHOICE

Core funds use major asset classes and fundamental investment strategies to form the foundation of a long-term portfolio.

### GROWTH

#### REACHING FOR THE STARS

Growth funds use a stock-picking strategy focused on fast-growing companies with high future potential.

### SUSTAINABLE

#### INVESTING WITH PURPOSE

Sustainable funds invest in companies that have a positive impact on society or the environment, and as part of their investment process, may exclude certain industries.

## Fixed income funds

# Bonds build bridges and attract interest

Ever wonder how the building of a bridge, school or factory is financed? These projects by governments and large corporations require far more money than the average bank can provide. With bonds, thousands of individual investors take on the role of lender. And in return, they earn a fixed stream of interest income for a set period of time.

In a bond mutual fund, your client becomes part-owner of hundreds of bonds, each hand-picked by the portfolio manager for credit quality, and representing a diverse range of countries, industries and issuers. Bonds are a stable foundation of any portfolio, with the ability to offset the impact of stock market fluctuations in the equity component of the portfolio.

Mackenzie FuturePath draws on the expertise and experience of Mackenzie's Fixed Income boutique, a leading innovator that looks beyond traditional bond strategies to provide the solutions that investors need today and tomorrow.

Mackenzie FuturePath **Canadian Core Plus Bond Fund**  
Mackenzie FuturePath **Global Core Plus Bond Fund**  
Mackenzie FuturePath **Money Market Fund**



## Fund codes & series

Funds	CIFSC category	Risk rating	Series PA			Series PH		
			A	B	C	A	B	C
Mackenzie FuturePath Canadian Dividend Fund	Canadian Dividend and Income	Low to medium	MFC13606	MFC13607	MFC13608	MFC13609	MFC13610	MFC13611
Mackenzie FuturePath Canadian Core Fund	Canadian Equity	Medium	MFC13600	MFC13601	MFC13602	MFC13603	MFC13604	MFC13605
Mackenzie FuturePath Canadian Growth Fund	Canadian Focused Equity	Medium	MFC13612	MFC13613	MFC13614	MFC13615	MFC13616	MFC13617
Mackenzie FuturePath Canadian Sustainable Equity Fund	Canadian Focused Equity	Low to medium	MFC13618	MFC13619	MFC13620	MFC13621	MFC13622	MFC13623
Mackenzie FuturePath US All Cap Growth Fund	US Equity	Medium	MFC13774	MFC13775	MFC13776	MFC13777	MFC13778	MFC13779
Mackenzie FuturePath US Core Fund	US Equity	Medium	MFC13630	MFC13631	MFC13632	MFC13633	MFC13634	MFC13635
Mackenzie FuturePath USD US Core Fund	US Equity	Medium	MFC13754	MFC13755	MFC13756	MFC13757	MFC13758	MFC13759
Mackenzie FuturePath US Growth Fund	US Equity	Medium	MFC13624	MFC13625	MFC13626	MFC13627	MFC13628	MFC13629
Mackenzie FuturePath US Value Fund	US Equity	Medium	MFC13636	MFC13637	MFC13638	MFC13639	MFC13640	MFC13641
Mackenzie FuturePath Global Core Fund	Global Equity	Low to medium	MFC13654	MFC13655	MFC13656	MFC13657	MFC13658	MFC13659
Mackenzie FuturePath Global Growth Fund	Global Equity	Low to medium	MFC13642	MFC13643	MFC13644	MFC13645	MFC13646	MFC13647
Mackenzie FuturePath Global Value Fund	Global Equity	Low to medium	MFC13648	MFC13649	MFC13650	MFC13651	MFC13652	MFC13653
Mackenzie FuturePath Shariah Global Equity Fund	Global Equity	Medium	MFC13760	MFC13761	MFC13762	MFC13763	MFC13764	MFC13765
Mackenzie FuturePath Canadian Equity Balanced Fund	Canadian Equity Balanced	Low to medium	MFC13678	MFC13679	MFC13680	MFC13681	MFC13682	MFC13683
Mackenzie FuturePath Canadian Balanced Fund	Canadian Neutral Balanced	Low to medium	MFC13672	MFC13673	MFC13674	MFC13675	MFC13676	MFC13677
Mackenzie FuturePath Global Equity Balanced Fund	Global Equity Balanced	Low to medium	MFC13690	MFC13691	MFC13692	MFC13693	MFC13694	MFC13695
Mackenzie FuturePath Global Balanced Fund	Global Neutral Balanced	Low to medium	MFC13684	MFC13685	MFC13686	MFC13687	MFC13688	MFC13689
Mackenzie FuturePath Canadian Core Plus Bond Fund	Canadian Fixed Income	Low	MFC13666	MFC13667	MFC13668	MFC13669	MFC13670	MFC13671
Mackenzie FuturePath Global Core Plus Bond Fund	Global Fixed Income	Low	MFC13660	MFC13661	MFC13662	MFC13663	MFC13664	MFC13665
Mackenzie FuturePath Canadian Money Market Fund	Canadian Money Market	Low	MFC13744	MFC13745	MFC13746	MFC13747	MFC13748	MFC13749
<b>Portfolios</b>								
<b>FuturePath Multi-Asset Portfolios</b>								
Mackenzie FuturePath Canadian Fixed Income Portfolio	Canadian Fixed Income	Low	MFC13696	MFC13697	MFC13698	MFC13699	MFC13700	MFC13701
Mackenzie FuturePath Global Fixed Income Balanced Portfolio	Global Fixed Income Balanced	Low	MFC13702	MFC13703	MFC13704	MFC13705	MFC13706	MFC13707
Mackenzie FuturePath Global Neutral Balanced Portfolio	Global Neutral Balanced	Low to medium	MFC13708	MFC13709	MFC13710	MFC13711	MFC13712	MFC13713
Mackenzie FuturePath Global Equity Balanced Portfolio	Global Equity Balanced	Low to medium	MFC13714	MFC13715	MFC13716	MFC13717	MFC13718	MFC13719
Mackenzie FuturePath Global Equity Portfolio	Global Equity	Low to medium	MFC13720	MFC13721	MFC13722	MFC13723	MFC13724	MFC13725
<b>FuturePath Monthly Income Portfolios</b>								
Mackenzie FuturePath Monthly Income Conservative Portfolio	Global Fixed Income Balanced	Low	MFC13732	MFC13733	MFC13734	MFC13735	MFC13736	MFC13737
Mackenzie FuturePath Monthly Income Balanced Portfolio	Global Neutral Balanced	Low	MFC13726	MFC13727	MFC13728	MFC13729	MFC13730	MFC13731
Mackenzie FuturePath Monthly Income Growth Portfolio	Global Equity Balanced	Low to medium	MFC13738	MFC13739	MFC13740	MFC13741	MFC13742	MFC13743

# Find your Mackenzie FuturePath

## Everything you need on your path to success

- Eight managed portfolios that are ready-to-go.
- 20 funds for building precisely the portfolio you need.
- Award-winning managers and sub-advisors.
- Canadian, US and global choices in all asset classes.
- Diversified by manager and investment style.
- Sustainable investments for those who want to invest with purpose.





**MACKENZIE**  
Investments

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