

CCMBC INVESTMENTS

January 2025



INTEREST RATE

The rate for January 1 to June 30, 2025 is

3.50%

per annum for all RRSP, TFSA, and Cash Accounts

Why invest?

Investing in CCMBC Investments helps provide mortgages to MB churches and their pastors. Your investment facilitates ministry growth in a variety of practical and profound ways.

For more information please visit our website at www.ccmcbclgacyfund.com, or contact us at legacy@mbchurches.ca or by phone at 1-888-669-6575.

RRSP DEADLINE

The RRSP Contribution deadline for the 2024 tax year is March 3, 2025.

Please note: To meet the above deadline, you must contact Capstone Asset Management to complete your Subscription Agreement and send your funds to our office by February 24, 2025.

2024 TFSA LIMIT

The annual TFSA dollar limit for the year 2025 is \$7,000.

Reminder! You must contact Capstone Asset Management to complete a Subscription Agreement prior to sending your TFSA contribution to our office, even if you have completed a Subscription Agreement in the past.



OUR STATEMENTS HAVE A NEW LOOK!

We're excited to share this update, which is part of the software enhancement we launched in September.

To help you navigate the changes to your statement, we've included a sample statement on the reverse side of this letter which highlights where to locate key information about your account.

See reverse for sample statement



Disclaimer: The information contained herein is for informational purposes only and is not an offer to sell or a solicitation of an offer to buy any securities in any province of Canada, and may not be relied upon in connection with the purchase or sale of any securities.

If you are interested in investing in CCMBC Investments Ltd. please contact Capstone Asset Management at 1-855-437-7103

John Doe
123 Anywhere St
City Province Z1Z 1Z1

← Account holder(s)
name and address

Statement

Date range of statement →

September 01, 2024 - September 30, 2024

Account Statement

ACCOUNT INFORMATION

Constituent ID: 11111 Account Type: Cash Account

Account Ending Balance: \$ 99,000.00

Withdrawals: \$ 1,000.00

Investments: \$ 0.00

Current total account balance

Your investment account number can be found here.
*note: depending on your account number, this space may show your associated Preferred Shares account number. Your investment account number may be just below.

If your account does not have any associated Preferred Shares this box will not be included in the Investment Summary.

Investment Summary

Investment #	Investment Type	Rate	Interest Paid YTD	Balance
99999	Cash Account	4.9000%	\$1,000.00	\$98,500.00
Investment #	Investment Type	Rate	Dividends YTD	Balance
98989	Preferred Shares - Cash Account	1.0000%	\$0.00	\$500.00

Investment Activity

Your account activity and any description.
Disbursements were previously called withdrawals.

Investment #: 99999		Investment Type: Cash Account			Interest Paid YTD: \$1,000.00	
Effective Date	Description	Amount	Penalty	Withheld	Fees	Balance
9/17/2024	Disbursement	\$1,000.00	\$0.00	\$0.00	\$0.00	\$98,500.00
EFT	Description of how you received the funds or where they were transferred.					

Investment #: 98989		Investment Type: Preferred Shares - Cash Account			Dividends YTD: \$0.00	
Effective Date	Description	Amount	Penalty	Withheld	Fees	Balance
9/30/2024		\$0.00	\$0.00	\$0.00	\$0.00	\$500.00

If your account does not have any associated Preferred Shares this information will not be on your statement.