CCMBC INVESTMENTS

Ministry-Focused Financial Services

1310 Taylor Ave
Winnipeg MB R3M 3Z6
ccmbclegacyfund.com

JULY 2025



The rate for July 1 to December 31, 2025 is

3.00%

per annum for all RRSP, TFSA, and Cash Accounts

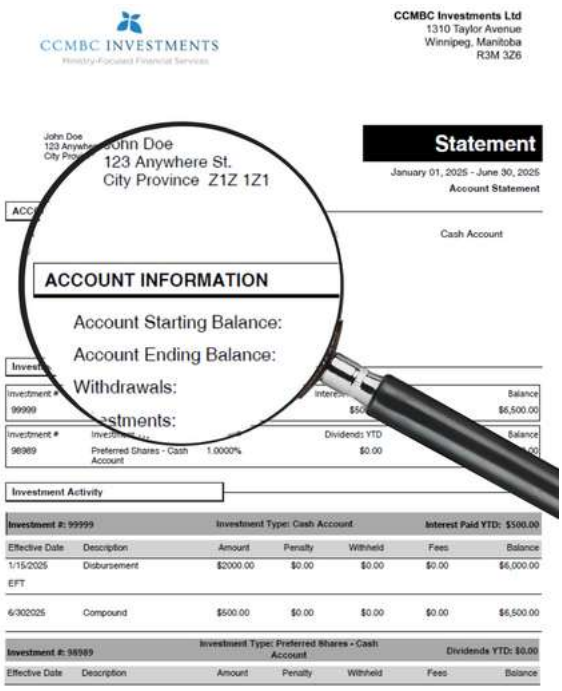
"I just wanted to say that we have appreciated having our accounts with you for all these years. We originally started these accounts to help save for our boys' post-secondary tuition. And now we have entered that life stage and these funds will help our family. So these accounts served their purpose for us over the years." - Mark T.

Update on Software Enhancements

As we approach the one-year mark since the launch of our software upgrades, we would like to extend our sincere thanks for your continued patience throughout this transition.

We are also grateful for the feedback we've received. Based on the input we received, the semi-annual account statements now include a starting balance to support clearer recordkeeping.

Looking ahead, we are exploring the potential to introduce online access in the coming year. We look forward to sharing more as plans develop.



JULY 2025

Your Support Helps Makes Ministry Possible

On behalf of the Canadian Conference of Mennonite Brethren Churches, thank you for your ongoing support. Your investments, whether from churches or individuals, form the foundation of Legacy's work. When you partner with us through investing, these funds allow us to provide mortgages to MB churches, pastors, and ministries across the country. The surpluses generated through this lending activity enable us to offer vital services to over 1,000 Mennonite Brethren ministry workers, including health and pension plans, payroll, and accounting support.

- Jason Krueger, CEO

We invite you to explore the additional resources that are available thanks to your ongoing partnership:

Available to everyone



Estate planning services (at no cost) through Advisors with Purpose

Donations of securities (at no cost) to your local MB church or ministry

Available to employees of MB Churches



Affordable online wills though Canada Life

Employee and Family Assistance (at no cost) available through our national benefits plan

Available to MB Churches and Ministries



HR Advisory Services though Spraggs Advisory Group

Legacy Accounts for excess funds, building projects, or investment diversification

For more information about these services, please visit our website at www.ccmbclegacyfund.com. You can also email us at legacy@mbchurches.ca, or call us at 1-888-669-6575.

Meet Lucie, a Key Member of Our Administrative Team



Lucie joined our team in 2024, bringing a friendly presence and strong organizational skills to her administrative support role. If you've contacted us about investments or payroll, you've likely already connected with her.

Supporting both the Investments and Payroll departments, she often serves as the first point of contact and helps keep operations running smoothly. Lucie brings joy to the office every day, and we're grateful for her care and warmth.

Outside work, she enjoys long walks, meeting new people, and spending time with family and friends.

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