



3032 West Stolley Park Road, Ste E • Grand Island, NE 68801  
P: 308.385.1500 • TF: 888.385.1520 • [www.allencapgroup.com](http://www.allencapgroup.com)

NexGen Consultants  
PO Box 541081  
Cincinnati, OH 45254

February 20, 2015

Dear Doug,

Working with NexGen, we really appreciate your attention to detail, taking the time to truly understand our system, and provide the guidance needed. It was exactly what we were looking for when searching for a local Salesforce consultant. We worked with Elise Pottinger, who was very knowledgeable with Salesforce as well as the TD Ameritrade interface.

Allen Capital Group is a Wealth Management Firm that offers our clients unbiased portfolio management, estate planning, tax planning and preparation, and risk management services. We are an Independent Registered Investment Advisor (RIA), and we work only for our clients. Client service is our specialty, and we take pride in being free of conflict and upholding our fiduciary duty. Obviously, it was vital that we have a CRM that is customized to our business model.

With Elise's help, we migrated our data from Junxure. In addition, she helped us create workflows using Process Composer. The system we now use incorporates the vision we had, and the NexGen team was with us each step of the way always very prompt, professional and with immediate results.

Again, thank you for working with us to implement Salesforce. We have been very impressed with NexGen's ability to deal with such complex matters as they relate to our business.

Sincerely,

A handwritten signature in black ink, appearing to read "Matt Thury", with a long, sweeping underline.

Matt Thury  
Allen Capital Group  
[www.allencapgroup.com](http://www.allencapgroup.com)