CAP COM Financial Services, LLC

A Registered Investment Advisory Firm.

Financial Advisors Specializing in IRAs, Retirement Plan Distributions & Estate Planning

March 29, 2018

From: Brian Tramontano
Cap Com Financial Services
Financial Center
4 Winners Circle
Albany, NY 12205

To: Randy Davis, President – NexGen Consultants

Dear Randy,

It is with great pleasure that I would like to inform you about our successful experience working with your firm. Back in 2016 my division of Cap Com Federal Credit Union—the Financial Services division—began an important initiative to move from our on-premise CRM we had been using (Goldmine) to Salesforce provided by LPL Financial. We worked with Doug Heilbrun to help scope out or needs and Elise Pottinger did the implementation. Both were extremely easy to work with, professional, and highly capable.

NexGen diligently mapped the data to transition from Goldmine, did a test migration as part of their process, and once we agreed everything was right, did a final migration of all of our data into Salesforce. Beyond the migration, Elise created a custom Appointment object to bridge the event, client, business process, and appointment needs we have. NexGen also built reports for us and an executive dashboard, helped set up functionality to segment our clients and provided automation to reflect our business processes. The interactive training Elise did for our users and our Salesforce admin helped shorten the learning curve and got us off to a great start and helped drive adoption.

The rest of the Credit Union had been on their own version of Salesforce, and I am happy to say NexGen was also hired to create an integration between the CU's version and our core system. Additionally, NexGen is integrating *both* versions of Salesforce so the Credit Union can share member data so our Financial Service division can work more closely with the Credit Union and provide our services to our valued members.

I am very pleased to work with such an experienced Salesforce partner and it is with enthusiasm I would recommend NexGen to any clients looking to have Salesforce configured to reflect a firm's business drivers.

Thanks,

Brian Tramontano

Director of Advisory Services and Sales

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