

CAPTRUST

85 East 8th Street, Suite 160
Holland, MI 49423
Ph: 616 392 5332 | 800 566 5012 | Fx: 616 392 5565

Keith Watters
NexGen Consultants
Cincinnati OH 45244

Dear Keith,

It is my pleasure to write this letter of recommendation for NexGen Consultants. Working with you and Elise Pottinger has been a pleasant and successful endeavor as we continue to utilize and enhance the Salesforce Financial Services Cloud platform. You both took the time to learn our business and apply appropriate customizations to our Salesforce environment. Our Salesforce project included the following elements:

- Completed the data migration from a dissimilarly structured environment (created households where household didn't exist) and moved this data into Salesforce
- Customized the FSC user interface to best accommodate CapTrust's business processes
- Created automation to update records to decrease user error and reduce clicks
- Implemented TaskRay for task management
- Enhanced productivity/collaboration for Consultants, Client Services & Relationship Managers
- Utilized workflow automation for the mitigation of errors and reduction of manual effort
- Provided End User, Reports/Dashboards & Administrating Training

The NexGen team of experts provided sound recommendations in Salesforce and strives to exceed our expectations. You continued to work with our processes and requirements until we had the level of customization needed for our unique circumstances. I confidently recommend NexGen Consultants as a premiere Salesforce implementation partner.

Sincerely,



Ryan Tyler
Director of Operations
ryan.tyler@ctfa.com
(800) 566-5012 (616) 392-5332