



March 30, 2018

Matt Mountain
NexGen Consultants
PO Box 541081
Cincinnati, OH 45254

Dear Matt:

I wanted to write and share how pleased my firm is with the work your team recently performed for us. Last year, Cardan Capital Partners transitioned away from our third-party strategic and operational partner, Dynasty Financial Partners. As a result, we needed to migrate from Skience's customized Salesforce overlay hosted by Dynasty Financial Partners to our own independent Salesforce tool.

After consulting with Doug Heilbrun to determine our needs, we had the good fortune of working with Elise Pottinger who helped us recreate (and even enhance) the customizations existing with the old platform and migrate our data to the new Salesforce platform. We had an extremely short transition timeline and NexGen partnered with us to develop a work plan that enabled us to meet our deadline. Throughout the process, we were consistently impressed with Elise's professionalism and ability to understand and execute on our requirements. Please note that none of us is a technology expert so it could not have been easy for her to walk us through the process. Thanks to her efforts, we were confident at all times during the engagement that she would execute. You should know that we spoke with three other firms before selecting NeXGen primarily because Doug truly listened, patiently explained what was required, was completely transparent and made recommendations without pushing his own agenda. Your firm stood out for these reasons.

Although we did not have the time or bandwidth to explore optimization last year, we will certainly reach back out to Doug and Elise should the need arise. And we have already hired your firm to assist with additional Salesforce customizations.



Please accept this letter as a heart thanks and resounding referral of NexGen as a trusted Salesforce partner.

Sincerely,

MARTI AWAD

Martha J Awad
CFA, CFP®, JD, LLM-Taxation
Founding Partner
Cardan Capital Partners