



March 30, 2018

To Whom it may concern:

This letter is to offer my sincere thanks and appreciation to NexGen Consultants and their team. Their efforts in helping my new firm through the implementation of our new CRM was invaluable.

Having used Zoho in the past, our executive team decided to go with Salesforce's Financial Services Cloud as an upgrade. Since we were not transitioning from a current CRM system NexGen's "Quickstart" package suited our needs perfectly.

We needed a way to track our client activities and easily see how the various relationships between households and their members, business accounts and other individuals (COIs). We also needed to have an integration between Salesforce and Outlook and wanted automation (workflows), reporting, and training to make sure we knew how to get the most out of the system as soon as we went live. NexGen provided all of this in expert fashion.

Beyond the standard FSC functionality, NexGen also designed custom functionality to provide:

- Ability to track and report on Large Equity position brokerage Opportunities
- Ability to track and report Proposals related to Large Equity position brokerage Opportunities
- Tracking of Large Equity positions

The point people for our NexGen relationship was Doug Heilbrun and consultants Ashley Evans and Elise Pottinger. Because of their hard work and insights our project went so smoothly we have retained their services for additional help as our needs evolve.

Please let this letter serve as a resounding endorsement for NexGen.

Sincerely,

A handwritten signature in blue ink, appearing to read "BOP" followed by a stylized flourish.

Brendan Connaughton
Managing Director and Founder