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WEALTH ADVISORS

This reference letter is our endorsement for NexGen Consultants, especially Alicia Yuenger, Kristen Crane and John Schneider as Salesforce.com consultants where they assisted us with our implementation by coordinating and managing a Salesforce Org separation (split) into a brand new, Financial Services Cloud (FSC) environment.

As part of our growth, we engaged NexGen and Salesforce on recommendations where we could scale efficiently but also maintain autonomy on our day to day operations. More so, we wanted to implement and deploy a more robust and scalable solution as we continue to grow as a firm. As a result, it is my pleasure to recommend the services of NexGen Consultants as we partnered with NexGen to organize, prepare and migrate our existing Salesforce (Sales Cloud) data into our new FSC environment.

We were reliant on their expertise and knowledge, to build the necessary relationships for our datasets, for migrating account, contact, opportunity and activity data into Salesforce but also to assist us moving into the FSC data model and architecture.

This was a critical component for us as we build out our data model to ensure we brought in previous data and not to miss any existing information during the implementation. The completion of the project provided us accurate and historical data input, standardization of data and more effective reporting capabilities. All of this coupled with the FSC data model and platform has now given us a tool to manage our business effectively and to scale for future development.

Their team took the time to listen to our needs and then translated them into a solution that addressed our unique challenges within a timely manner. NexGen is a great implementation and consulting firm for any financial services organization looking to enhance or maximize their use of Salesforce or to move to the FSC data model. We confidently recommend NexGen Consultants as a trusted and reliable partner!

Sincerely,

Brian Dodds
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