

June 29, 2017

NexGen Consultants  
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Matt,

Now that we have gone live with the Financial Services Cloud, I would like to thank you, Elise Pottinger and Justin Davis for all of your help in migrating us from APX's CRM system to Salesforce.com.

With the Financial Services Cloud being relatively new, the NexGen team had a thorough understanding as to its capabilities, the new data model and how to customize it to support our end users' needs. You were able to build a data integration from APX that allows us to update our clients, households, financial accounts and holdings on a nightly basis so that our advisors can now work in one system to manage their clients. Additionally, we now have true visibility into the household, its members and all of its assets, which we previously did not have in APX.

Many of our manual business/workflow processes have not been automated by assigning tasks to various people automatically. This will save us a tremendous amount of time in coordinating these activities and allow us to provide a higher level of service.

NexGen is extremely knowledgeable in the Financial Services Cloud and anyone looking to move to this cloud should definitely consider working with NexGen. Thanks again for all of your help.

Sincerely,



Lydia Taylor  
Business Information Manager