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April 15, 2014

Matt Mountain  
NexGen Consultants  
665 Balbriggan Court  
Cincinnati, OH 45255

Dear Matt,

Last month was the completion date for our Salesforce implementation project. It is with well-earned respect that I recommend NexGen Consultants for LPL advisors looking to begin using the Salesforce for LPL program. We had the pleasure of working with Elise Pottinger, who was extremely responsive and attentive. Elise demonstrated a high level of intelligence, understanding, and proficiency during every step of the migration. Because of Elise, our transition to the LPL Salesforce.com program was quick and seamless.

Our project included migrating our data from Red Tail. She was able to migrate our data into the relationship groups custom object. In addition, LPL uses record types on the person account called BranchNet and Non-BranchNet. She helped us understand how the Salesforce for Outlook connector works, and helped train our team on using the new system.

Harvest Financial has found a true consulting partner in NexGen Consultants and we look forward to your continued support.

Sincerely,

Timothy J. McKenna Jr.  
Business Manager

[www.harvestfinancialplanning.com](http://www.harvestfinancialplanning.com)

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