



March 30, 2018

IFAM is an (RIA) with offices in Denver, CO, Fort Collins, CO, and Sioux Falls, SD. The clients we serve are institutional, family office, and ultra-high net worth clients. Last year we transitioned our Portfolio Management System from Tamarac to Orion Advisor Services because Tamarac had proven to be too much of a "do it yourself" platform and lacked good reporting functionality. Since Tamarac also included a CRM system, we needed to convert from Tamarac Advisor to Salesforce at the same time. Needless to say, these important initiatives meant it was critical that we find an experienced and reliable partner to help us through the Salesforce implementation.

After speaking with our contacts at Orion, they recommended NexGen Consultants. We worked with Kristen Crane and Becci Gearman, who took the time to understand our unique business needs and the intricacies of migrating CRM data into our new Salesforce instance that was also being fed household financial data from Orion. The process she used ensured there would not be duplicate records and allowed all of our client data from both systems end up in one place to more easily track our client interactions while having a view of their portfolio info saving us time.

IFAM also relies on Microsoft Outlook to manage client contact information, send emails, and set appointments. One of the hassles we needed to eliminate was the duplication of effort required to change the address in both Tamarac and Outlook whenever a client moved. Kristen worked with us to make sure the Outlook Connection integration was properly set up and now the feed between the two systems has eliminated the duplication of effort that had been slowing us down. Everyone is quite pleased!

Finally, NexGen provided interactive training that allowed our users to become more familiar with how to navigate this new system and they also trained me how to work the 'back end' of Salesforce to empower me to take on the configuration changes often required to keep our system mirroring the latest changes in IFAM's day to day operations.

Repeat business is the biggest endorsement I can give and we have retained NexGen to provide additional Salesforce support as needed. I would recommend NexGen to anyone looking to make sure the transition from any system to Salesforce is done right.

Sincerely,

A handwritten signature in dark ink that reads "Kim Jardine". The signature is written in a cursive, flowing style.

Kim Jardine
Senior Compliance Officer/Director of HR