

June 10, 2013

Donald Hampton  
NexGen Consultants

Dear Donald,

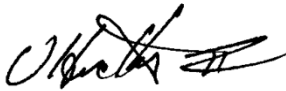
As you know, Lumin Financial, LLC has been managing investments since 2000. We are not like other investment firms. We pride ourselves on being independent, with no ties to a large brokerage firm that might conflict with our focus on putting our clients first. This focus on clients makes it imperative that we have a CRM that is both complete and intuitive to our business.

We have been Salesforce users for awhile, but we felt we needed to customize it for our needs. NexGen Consultants helped us to reconfigure our Salesforce environment to create a platform that is unique to our situation and allows us to treat our customers as individuals. Specifically, we worked with NexGen Consultant, Kristen Crane, to accomplish the following:

- Redesigned Salesforce to fit our business model – we stopped using person accounts – moved to standard Account/Contact model, added record types, fields, related lists, etc.
- Exported data
- Reviewed data to determine best way to import into the new design
- Re-imported data
- Knowledge transfer

Kristen was able to provide extremely beneficial consulting that resulted in our ability to use Salesforce.com as a tool to drive efficiency and business process. Thank you to Kristen and NexGen Consultants for completing the project in an efficient and professional manner.

Sincerely,



**Victor H. Hicks II, CFP<sup>®</sup>, AIF<sup>®</sup>**

Managing Principal

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