



Doug Heilbrun
NexGen Consultants

December 18, 2017

Dear Doug,

This letter is to commend NexGen for their help with our recent Salesforce org migration. PFG provides services to Credit Unions and just recently we moved from our broker/dealer LPL Financial to create our own RIA via Securities America. Having worked with NexGen in the past, I knew your team would be the consultant of choice to help us migrate our data from our LPL org into a new Salesforce org using Orion Connect. Our challenge was that we had multiple institutions and multiple advisors all working in that one org and needed to parse out whose data was coming over, and whose was not. Having had this customized org for years, it was critical that we found someone familiar with both versions of Salesforce and Elise Pottinger was amazing. As you can imagine, we had tens of thousands of Accounts, Contacts, Notes, Leads, Opportunities and hundreds of thousands of Activities to bring over. Making the matter more complex was we had another Salesforce org that also needed to come over into our new org.

I have been a pretty savvy Salesforce admin for a number of years, and could handle the security model set-up, as well as the web to lead and lead assignment rules. Migrating critical customer data however, takes a deft touch and there was no way we wanted to try this on our own.

Please let this letter serve as an endorsement of NexGen, and be assured that for additional Salesforce support needs we may have, we will certainly reach out to NexGen.

Thanks again,

Sara Baker
VP National Director of Training
And Program Management
Priority Financial Group

Quality Advice...Quality Advisors

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