

Andrew Cooper
(P) 212-729-7303
(F) 888-712-1647
Andrew@AJwealthllc.com



Justyn Volesko, J.D., LL.M.
(P) 212-729-7307
(F) 888-712-1647
Justyn@AJwealthllc.com

July 9, 2019

Dear Matt and Randy,

This letter is to give my heartfelt thanks for the work provided by your company. AJ Wealth is a comprehensive wealth management firm based in New York City. We recently implemented Salesforce.com's Financial Services Cloud and we couldn't have done it without NexGen's help.

We are very particular and have high expectations -- we vetted a number of consulting firms and weren't impressed with any of them until we came across NexGen Consultants. We had a great experience from our initial dealings with Doug Heilbrun who is a pleasure to speak with and paid close attention to what we were looking for, to our dealings with Kerry Schoepfle who has built out a fantastic platform for us and is now one of my favorite people to work with. She's a Salesforce expert, fast, thoughtful and always comes from a place of 'yes'.

Our project included:

- Data migration from our legacy CRM (Junxure)
- Data migration from FreshDesk ticketing system
- Installation of NexGen's Accelerator for FSC
- Creation of:
 - A highly customized Household record page layout
 - A custom object to track Tax Payments, and Tax Returns
 - A custom object to track Estate Documents on file for client
 - Various case record types with corresponding support processes in order to streamline and provide structure around common processes (onboarding, service requests, etc.)
- Outlook Integration
- Email-to-Case configuration
- Support queues established for different departments
- Admin and End-User Training

The whole NexGen team was great to work with and I highly recommend them. Please let this letter serve as a reference for your team's first-rate quality work. We look forward to working with you throughout our Salesforce journey!

Sincerely,

A handwritten signature in black ink, appearing to read 'Justyn Volesko', with a stylized flourish at the end.

Justyn Volesko
Managing Partner at AJ Wealth