



July 25, 2019

Alicia,

As the project manager on our recent Salesforce.com project, I want to thank you, John Schneider and Kerry Schoepfle for all of your help. We selected Salesforce.com's Financial Services Cloud as a replacement for our Microsoft Dynamics CRM application and wanted to have a system that would provide the following:

- Help our Wealth Advisors provide better service to their clients
- Better recruitment of advisors to our firm
- Enhanced Compliance with our advisors
- Streamlined processes across multiple departments

Since many of our advisor offices also run RedTail, it is important for us to have a standard data model that each office can use. We are providing our solution to these advisors through the full use FSC licenses as well as through the Partner Community licenses. Although the Partner Community licenses are more limited, there is a cost advantage for users that don't need the full functionality within FSC.

Your two-step methodology of gathering requirements/designing the system upfront was perfect for Stratos. It allowed our users to see and test the system over time and it allowed us to provide feedback into the final solution. Our users really liked the prototyping processes that we went through.

You were referred to us by a peer of ours and we are thrilled with the partnership that we have. We look forward to a long-term partnership.

Thanks again,

Lou Camacho
President, Stratos Wealth Alliance