



Office: (928) 329-1700
Fax: (928) 329-1701
Toll Free: (877) 986-2468
www.yumainvestmentgroup.com

182 E. 16TH STREET
SUITE D
YUMA, AZ 85364

From: Krystle Mayorga
Chief Operating Officer
Yuma Investment Group Wealth Management

April 12, 2019

Dear Matt,

This letter is to recognize NexGen Consultants for the excellent job in helping us with our Salesforce needs.

Back in 2012, NexGen first worked with Yuma to help move from Goldmine over to LPL Financial's version of Salesforce, and since then have been there to help with any support we have needed. Last year we decided to make the move from our current version of Salesforce to their premier product, the Financial Services Cloud.

Our NexGen account executive Doug Heilbrun worked closely with us to make sure the SOW he provided suited our needs. Because we were transitioning to become a hybrid RIA, we needed to get up and running quickly, so we opted for the Quickstart package NexGen offers. For our FSC implementation, we worked with Elise Pottinger who is amazing. She helped us migrate our Salesforce data over to the new data model in FSC and also provided some training.

Having been on FSC now for several months, the benefits we realize are many: We are able to have color coded calendars which is helpful as we have multiple calendars to track and schedule. Easily seeing the next and last client interaction allows us to see who we are behind on reaching out to and who does not have a next appointment scheduled.

The ability to easily see household information is fantastic as we can view all information related to a household: We can have activities and financial information roll up to the household level, and we can connect children, CPA's and attorney's as related contacts enabling us to view the most updated record of that contact. Via the reciprocal role functionality in FSC, we can easily see a COI's record and view all of our clients who use them.

Working with NexGen is always a pleasure because your people are so friendly, helpful, and we can always count on them getting the job done right and on time. Please let this letter serve as an endorsement of your company. We were fortunate to use your services for such important initiatives and will use NexGen for any applicable future projects.

Thanks for everything,

Krystle Mayorga