SEQUOIA
FINANCIAL GROUP

EARNING TRUST.
CREATING PLANS.
DELIVERING RESULTS.

To: Randy Davis, Matt Mountain

This letter is to relay Sequoia's extreme satisfaction with our trusted Salesforce partner – NexGen Consultants. Back in 2017, our $3.5B RIA recognized the need to make some changes to support our continued growth. One of the changes we recognized would be needed was to move away from the current CRM (Microsoft Dynamics) we shared with our accounting partner to our own independent system. Wanting to find the best technology that would not only support us for the short term, but also be flexible enough to provide for our needs as we evolved, the choice was simple: Salesforce's Financial Services Cloud (FSC).

Once the decision for Salesforce FSC was clear, we moved on to our next critical decision – namely picking a partner who had not only successfully implemented Salesforce, but also had the critical knowledge of the wealth management industry essential to making FSC come to life. After interviewing multiple partners and making sure we dotted all i's and crossed all t's before pulling the trigger, we decided on NexGen. There are several reasons: Our Account Executive Doug Heilbrun was incredibly helpful in making sure our multitude of questions got answered and in a timely fashion. Doug's friendly 'can do' attitude and willingness to dive in has never waivered and we know we can always count on him when needs arise. In addition, NexGen brought multiple resources to make sure our presales questions got answered. Whether it involved scoping out custom development that would be needed or speaking with other vendors (Schwab, Tamarac, etc.) on our behalf, it was clearly apparent NexGen would do what was needed to provide us the confidence needed to move forward.

Once we had executed the SOW, the level of attention only increased. We worked closely with Project Manager Alicia Yuenger who took the reigns of our project to make sure we were on track from the get-go. We have now worked with Alicia on multiple projects and her understanding of our operational style makes complex needs so much easier to address. Alicia always strives to find the best solution based on our requirements and it does not take long to recognize her commitment to providing results. We are not your typical RIA, and often have requests that are out of the box and Alicia is never thrown. In addition to Alicia, we were incredibly fortunate to work with Elise Pottinger as our lead consultant. Elise's years of experience working firms in our industry paid dividends as she brought a store of best practices that were invaluable throughout the implementation. Additionally, it was readily evident that Elise was on the forefront of working with firms implementing FSC over the three years since it's been on the market. I would be surprised if there is a more knowledgeable consultant in the country when it comes to FSC, and her hard work to make sure our implementation was done properly and on time was amazing. Since the initial implementation, we have also had the opportunity to work with other team members John Schneider and Shannon Brown. Both share the traits we have come to experience with everyone we work with at NexGen as they are both extremely bright and solution-oriented.

Along with migrating our Microsoft Dynamics data to FSC, other aspects of the project included the creation of customized home pages for each team with a link to customized training materials specific to Sequoia along with a view of Today's tasks and events. Our Account pages allow us to easily see how many related Cases, Trade Tickets, and Opportunities are related to the Account as well as view all past client activity. We are also able to link directly into our Portfolio Management System (Tamarac) through the integration NexGen helped us with. Along with the Tamarac integration, NexGen helped create a first of its kind integration with Schwab Advisor Center that provides single sign-on allowing our advisors to quickly see a 360-degree view of the client's financial accounts. Utilizing the Salesforce Case Module, we can manage Salesforce feedback from users as well as service our client accounts and by employing robust automation behind most of these cases we are able to route ownership, change status, and create tasks. Additional items that NexGen assisted with included the creation of reports and dashboards, mobile configuration, creating automation throughout the system utilizing the many tools native to Salesforce and helping set up Salesforce's marketing automation tool Pardot so we can reach out to our clients and prospects in a more meaningful way based upon their interests.

Since our FSC org has gone live, we continue to expand our use case and rely on the NexGen team as our trusted Salesforce partner. As Sequoia continues to grow (we are now nearing $5B), it's good to know we have a partner who thoroughly understands how we operate and can continue to tailor FSC to our ever-evolving needs. We have been active proponents of NexGen's work, willingly sharing our experience and even doing a webinar to showcase our FSC environment. Please let this letter serve as a ringing endorsement of our extreme satisfaction with our partnership. We look forward to continuing it for years to come.

Thank you NexGen!

Trevor Chuna

Chief Technology Officer at Sequoia Financial Group