



SNOW GARRETT
WEALTH MANAGEMENT

August 13, 2014

NexGen Consultants
Attn: Doug Heilbrun

Dear Doug:

Last month was the completion date for our project with NexGen and I would like to compliment the work that was done. As you know, Snow Garrett Wealth Management is recognized as an industry leading financial services firm. As an independent financial services firm, we represent our clients and their interests rather than any specific company so it was very important that we have a forward thinking CRM. We had been using Goldmine with the Breaking Away overlay and were interested in moving to LPL's Enterprise edition of Salesforce.

We had the opportunity to work with Elise Pottinger. She was very knowledgeable, professional and very patient! NexGen successfully migrated our existing data from Goldmine and then tailored the LPL Financial Salesforce.com solution to fit our needs.

We look forward to a continued relationship with NexGen Consultants as a Salesforce partner.

Please consider sharing this letter as a recommendation to other wealth management firms looking for help with Salesforce.

If you have any questions or comments, please don't hesitate to contact me.

Sincerely,

Jen Dempsey

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