



THOMSON
FINANCIAL MANAGEMENT

March 29, 2018

Doug Heilbrun
NexGen Consultants
Cincinnati, OH

Dear Doug,

We are happy to be writing our second recommendation letter for NexGen Consultants. As you are aware, our office previously used Salesforce Classic through our broker dealer. Since moving to a new broker dealer in November 2017, our biggest concern was migrating years of client data correctly from one instance of Salesforce to another.

After working for a few months with a local consultant who wasn't as familiar with the Salesforce Financial Services Cloud as we had thought, we decided to return to NexGen consultants for help. Elise Pottinger was assigned to our project. She was very familiar with the Salesforce Financial Services Cloud. Elise had the challenge of determining whether to start the project from scratch or to work to correct multiple objects with incorrect data. We were impressed with her knowledge, expertise and how she was able to explain the differences between Salesforce Classic and Salesforce Financial Services Cloud in a way that we could understand.

We appreciated Elise's patience and availability. She took as much time as needed during our calls to address our concerns and needs and whenever we had a question, we could send her an email and expect a reply the same day. Elise was able to share best practices with us, provide examples of how other offices use Salesforce as well as adjust our Salesforce instance to accommodate our needs.

After working with NexGen for 2 large Salesforce projects, we've decided to always turn to NexGen when we need assistance with our Salesforce projects. NexGen have always provided our office with the highest level of work, paying close attention to detail and taking on the project as if were their own.

We are extremely happy to recommend NexGen's consulting services to other companies or investment firms who are looking to implement Salesforce. We're looking forward to working with you in the future.

Sincerely,

Thomson Financial Management

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