

June 15, 2015

NexGen Consultants Inc.



Dear Doug,

Thank you for your persistence in follow up and for encouraging us to hire NexGen. We recently completed our migration from Redtail to Salesforce.com and are thrilled with the quality and timeliness of work. Elise Pottinger was a delight to work with; she was able to help us migrate over quite a bit of data that needed unique fields built and she was always responsive with answers to our questions. Elise has a robust understanding of Salesforce and was able to provide some insight to help us make some additional decisions outside of the migration as well. I believe that insight will help us to move forward with some additional integration.

I would recommend NexGen Consultants Inc. to any wealth management firms considering a move to Salesforce.com. The training provided by Elise was extremely helpful to both administrators and staff. We're now just a few weeks into our full-time use of Salesforce.com and have firm-wide adoption and excitement about what all we can do moving forward to enhance and leverage Salesforce.com in the future.

I would not hesitate to hire NexGen Consultants Inc. again in the future. In fact, I look forward to a continuing consulting relationship as we continue to build out additional integrations and workflows.

Sincerely,

Searcy Financial Services, Inc.
Registered Investment Advisor

By: 

Jessica Maldonado, AIFA®, C(k)P®, PPC™, GFS™
Vice President

Searcy Financial Services, Inc.

12980 Foster Street, Suite 160 Overland Park, Kansas 66213 Phone: 913.814.3800 Fax: 877.808.6353

www.SearcyFinancial.com