



THE STERLING GROUP
Registered Investment Advisor

May 19, 2015

To Whom It May Concern:

This letter is written to express our utmost satisfaction with the Salesforce implementation completed by NexGen Consultants. NexGen was contracted to implement the Salesforce CRM application and customize it to meet our particular needs. Elise Pottinger was our project manager and it was immediately obvious that she has extensive experience in our area of business.

Our implementation included the following:

- We appended our historical Goldmine data against Orion-generated households
- We created custom objects to hold Insurance, Relationship and Opportunity data
- We implemented an application to more easily manage Activities

NexGen not only helped us to implement Salesforce, but also took close care in understanding our total adoption needs through training.

We are impressed with the commitment and outstanding quality of the services provided by everyone on our NexGen team, as they were very instrumental in the successful completion of our project.

Sincerely,

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