



July 8, 2015

Dear Doug,

Our Salesforce project is complete and I was very satisfied with the end result. Our goal was to customize our existing TD Ameritrade environment. The NexGen team did a great job of understanding my needs, and then they clearly and concisely mapped-out the best way to meet those needs.

Shannon Brown worked on the implementation and did an excellent job. Together we worked through all of the facets of the project and completed it successfully, including the following:

- Restructured data and removed fields not being used
- User interface cleanup and organization
- Building 4 Workflows for the New Prospect process, Insurance process, Investment Process, & Ongoing Client Review process
- End User Training
- Admin Training

NexGen was responsive to our follow-up requests and got the job done. They were thorough, professional, knowledgeable, and most importantly - honest.

Sincerely,

A handwritten signature in black ink, appearing to read "Sy Pugh".

Sy Pugh
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Worth Financial Advisory Group