

# **Salesforce Financial-Services-Cloud Test Study Guide - Financial-Services-Cloud Authentic Exam Questions**



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Salesforce FSC Accredited Professional certification exam covers a wide range of topics, including financial services industry trends, client management, and financial planning. Financial-Services-Cloud Exam also includes questions on Salesforce Financial Services Cloud platform features, such as financial accounts, opportunities, and activities. To pass the exam, candidates must demonstrate a deep understanding of these topics and their application in real-world scenarios.

Salesforce Financial-Services-Cloud (FSC) Accredited Professional Certification Exam is designed for professionals who are interested in demonstrating their expertise in using the Salesforce Financial Services Cloud platform. Salesforce Financial Services Cloud (FSC) Accredited Professional certification is ideal for individuals who have experience working with financial services products, such as insurance, banking, and wealth management. The FSC Accredited Professional Certification Exam is specifically targeted at individuals who are looking to enhance their careers by demonstrating their knowledge of financial services and their ability to use the Salesforce platform to provide innovative customer solutions.

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## **Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q105-Q110):**

**NEW QUESTION # 105**

Which information can you find under the Relationships Tab? - (Check the 3 that apply)

- A. Summary information about Total Financial Accounts. This includes total assets under management at your firm, the Category (i.e. Platinum), client interactions, including the last interaction and the next interaction scheduled in the future.
- B. Related contacts that play a role in the financial world of the client (i.e a family lawyer)
- C. Related accounts - accounts not directly included in the primary household.
- D. Primary household Information, including the members of the household and how the household is related to other groups.

**Answer: B,C,D**

#### **NEW QUESTION # 106**

Rachel is the primary member of the Adams household hired a new attorney. What type of relationship should the Wealth Advisor create in Financial Services Cloud for Rachel and her attorney before assigning the reciprocal role of "Attorney"?

- A. Create an Account-Contact relationship between the Adams Household and the attorney.
- B. Create an Account-Account Relationship between the Addams Family Trust and the attorney.
- C. Create an Account-Account relationship between the Adams Household and the attorney
- D. Create a Contact-Contact Relationships between the primary member of the Adams Household and the attorney.

**Answer: D**

Explanation:

Explanation

To create a relationship between Rachel and her attorney before assigning the reciprocal role of "Attorney", the Wealth Advisor should create a Contact-Contact Relationship between the primary member of the Adams Household and the attorney. A Contact-Contact Relationship is a junction object that links two contacts or individuals and defines their relationship with each other<sup>2</sup>. By using Contact-Contact Relationship, the Wealth Advisor can capture Rachel's extended network of relationships with people outside of her household.

Verified References: 2

#### **NEW QUESTION # 107**

If a client is associated with more than one Household or Group, where will this clients records get rolled up to?

- A. to the household selected by the advisor for record rollups.
- B. to all the parent households and groups
- C. to the household with the client's primary address
- D. to the Household where the client is the primary member

**Answer: A**

Explanation:

If a client is associated with more than one Household or Group, their records will get rolled up to the household selected by the advisor for record rollups. A Household or Group is a construct in Financial Services Cloud that allows you to group related accounts together and view their aggregated financial data and activities. A client can belong to multiple Households or Groups, but only one of them can be selected as their primary Group for record rollups. The primary Group determines which Household or Group will display the client's records in its summary components or related lists. The advisor can select or change the primary Group for a client using the Primary Group field on the client's record page. Verified References: : Salesforce Help Article 6

#### **NEW QUESTION # 108**

Lake Tahoe Bank's System Administrator is implementing intelligent Need-Based Referrals in Salesforce. Referrals are modeled on the Lead object. Which three Lead features can the System Admin use for Intelligent Need-Based Referrals?

- A. Einstein Lead Scoring
- B. Web to-Lead
- C. Lead Assignment Rules
- D. Lead Approval
- E. Lead Routing

**Answer: A,C,E**

Explanation:

The System Admin can use the following Lead features for Intelligent Need-Based Referrals:

Lead Routing, which is a feature that allows users to distribute leads to the right users or queues based on criteria such as lead source, industry, or product interest.

Lead Assignment Rules, which are rules that specify how to assign leads to users or queues when they are created manually, captured from the web, or imported via Data Import Wizard.

Einstein Lead Scoring, which is a feature that uses artificial intelligence to analyze historical data and predict how likely a lead is to convert. Einstein Lead Scoring assigns a score and an insight to each lead, which can help users prioritize and follow up on the most promising leads.

**NEW QUESTION # 109**

A financial services company needs a custom field for reporting when relating two business accounts to each other. Which object should the administrator configure the custom field on?

- A. Contact-Contact Relationship
- B. Account
- C. Account Contact\Relationship
- D. Account Account Relationship

**Answer: D**

Explanation:

Explanation

To configure a custom field for reporting when relating two business accounts to each other, the administrator should configure the custom field on the Account-Account Relationship object. The Account-Account Relationship object is a custom object in Financial Services Cloud that allows you to create and manage relationships between two accounts, such as Household Member, Business Owner, Trustee, or Friend. You can use the Account-Account Relationship object to store additional information about the relationship between two accounts, such as role, start date, end date, or status. You can also use the Account-Account Relationship object to report on the account-account relationships and analyze their impact on your business. Verified References: : Salesforce Help Article [4] : Salesforce Help Article [5]

**NEW QUESTION # 110**

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Nobody wants to be stranded in the same position in his or her company and be a normal person forever. Maybe you want to get the Financial-Services-Cloud certification, but daily work and long-time traffic make you busier to improve yourself. There is a piece of good news for you. Thanks to our Financial-Services-Cloud Training Materials, you can learn for your Financial-Services-Cloud certification anytime, everywhere. With our Financial-Services-Cloud study materials, you will easily pass the Financial-Services-Cloud examination and gain more confidence. Now let's see our products together.

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