

2026 Marvelous AP-208: Reliable Financial Services Cloud Accredited Professional Dumps Sheet



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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q103-Q108):

NEW QUESTION # 103

A retail bank is using Financial Services Cloud to support its operations. The bank has received complaints that its clients'

documentation is often submitted late and when clients call, customer service agents are struggling with multiple systems to determine where the documentation is.

Which solutions should a consultant suggest the client explore?

- A. A Marketing Cloud integration to manage client communications
- B. An APEX solution to leverage the SendMail capabilities of Salesforce
- C. Process Builder to create automatic document requests for missing items
- **D. The Send Documents flow for Retail Banking**

Answer: D

Explanation:

The solution that the consultant should suggest the client explore to improve its clients' documentation submission and tracking is the Send Documents flow for Retail Banking. The Send Documents flow for Retail Banking is a prebuilt flow that allows users to send documents requests to clients via email and track the status of the requests in FSC. The flow uses DocuSign eSignature integration to enable clients to sign and return documents electronically. By using the Send Documents flow for Retail Banking, the consultant can help the client streamline and simplify its document management process and improve its customer service agents' efficiency

NEW QUESTION # 104

Which Salesforce Financial Services Cloud feature enables financial advisors to track and manage client accounts?

- A. Opportunity management
- **B. Financial accounts management**
- C. Client onboarding
- D. Performance reporting

Answer: B

Explanation:

Financial accounts management is a Salesforce Financial Services Cloud feature that enables financial advisors to track and manage client accounts. A financial account is any account managed by a financial institution, such as a bank, an insurance company, or an investment firm. Financial Services Cloud supports many kinds of financial accounts, such as checking accounts, savings accounts, mortgages, credit cards, investment accounts, insurance policies, and more³. Financial advisors can use Financial Services Cloud to view, create, update, and delete financial accounts for their clients, as well as link them to other objects, such as households, goals, referrals, or opportunities⁴.

References:

Financial Accounts

Manage Financial Accounts

NEW QUESTION # 105

Which three related lists are visible within Actionable Relationship Center associated with the Account object?

- **A. Household Financial Accounts**
- B. Notes and Attachments
- **C. Client Financial Goals**
- D. Cases
- **E. Financial Holdings**

Answer: A,C,E

Explanation:

The following related lists are visible within Actionable Relationship Center (ARC) associated with the Account object: Client Financial Goals, which is a related list that displays the financial goals of the account, such as retirement, education, or debt payoff.

Financial Holdings, which is a related list that displays the financial accounts of the account, such as bank accounts, investment accounts, or insurance policies.

Household Financial Accounts, which is a related list that displays the financial accounts of the account's primary group, such as household or business group.

NEW QUESTION # 106

Lake Tahoe Bank is rolling out Financial Services Cloud and the VP of IT is concerned about the cost of the licenses. The System Admin recommends using restricted licenses for users that need only limited access to Financial Service Cloud features. Which Financial Services Cloud permission set license enables user access to a license with contractual restrictions for Financial Services Cloud and can be used to grant restricted access to users like Bank Tellers?

- A. Financial Service Cloud Basic
- B. Financial Service Cloud Extension
- C. Financial Services Cloud Standard
- D. Client Segmentation

Answer: A

Explanation:

To grant restricted access to users like Bank Tellers who need only limited access to Financial Services Cloud features, the Admin can use Financial Service Cloud Basic permission set license. This license enables user access to a license with contractual restrictions for Financial Services Cloud and provides access to core objects such as accounts, contacts, leads, opportunities, cases, activities, reports, dashboards, and custom objects. This license also provides access to some Financial Services Cloud features such as Action Plans, Actionable Relationship Center (ARC), Branch Management, Complaint Management, Data Consumption Framework (DCF), Discovery Framework (DF), Document Generation (DG), Groups (Householding), Intelligent Document Automation (IDA), Intelligent Need-Based Referrals and Scoring (INRS), Referral Management (RM), Relationship Builder (RB), Relationship Groups (RG), Relationship Map (RM), Timeline (TL).

NEW QUESTION # 107

The Salesforce Administrator at Lake Tahoe Bank is asked to make modifications to the Salesforce org to allow for more than one person being joint owners on a Financial Account. What will be the recommended approach to model this requirement?

- A. Create lookup fields on the Financial Account object to support additional owners
- B. Map additional owners using the Financial Account Role.
- C. Map additional owners using the Actionable Relationship Center.
- D. Map the primary owner and one joint owner to the Financial Account, because FSC, supports only two joint account owners.

Answer: B

Explanation:

To model a requirement where more than one person can be joint owners on a Financial Account, the Admin can map additional owners using the Financial Account Role. The Financial Account Role is a junction object that links a contact or an individual to a financial account and defines their role or relationship with that account. By using Financial Account Role, the Admin can add multiple owners to a Financial Account and specify their ownership percentage, primary status, and other details.

NEW QUESTION # 108

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