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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q32-Q37):

### NEW QUESTION # 32

Lake Tahoe Bank is evaluating Financial Services Cloud to help them deliver a customer-centric view. They currently have a heavily customized Salesforce implementation with a product-centric design. Lake Tahoe Bank wants to make sure planned changes have a minimal impact on users during implementation. What is the recommended approach for implementing Financial Services Cloud at Lake Tahoe Bank?

- A. Implement Financial Service Cloud in the existing org (Brow Field).
- B. Implement Financial Service Cloud in the existing org's Sandbox and then deploy to production org to mitigate the end-

user impact

- C. Implement Financial Service Cloud in a Trial org and convert the Trial org to production org.
- D. Implement Financial Service Cloud in a new org (Green Field) and redesign business capabilities in the new org.

**Answer: D**

Explanation:

The recommended approach for implementing Financial Services Cloud at Lake Tahoe Bank is to implement Financial Service Cloud in a new org (Green Field) and redesign business capabilities in the new org. This approach allows Lake Tahoe Bank to leverage the best practices and features of Financial Services Cloud without being constrained by their existing customizations and data model. It also minimizes the impact on users during implementation, as they can continue to use their current system until the new org is ready to go live. A green field implementation requires careful planning, data migration, and change management, but it can result in a more efficient and customer-centric solution. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 8.

### NEW QUESTION # 33

An investment bank is implementing Financial Services Cloud (FSC) to manage the deal pipeline. Each opportunity has confidential information that the deal team members must only view. In addition, each member needs the ability to take and share notes directly within Salesforce with others on the team.

Which three FSC features should be part of the solution design?

- A. Financial Deal Management
- B. Sharing Rules
- C. Compliance Data Sharing
- D. Profiles
- E. Interaction Summaries

**Answer: A,B,E**

Explanation:

The following FSC features should be part of the solution design for managing confidential deal information and notes sharing among deal team members:

**Financial Deal Management:** Financial Deal Management is a feature in Financial Services Cloud that allows you to track and manage complex deals that involve multiple parties, products, and stages. You can use Financial Deal Management to store confidential deal information such as deal name, amount, status, or participants. You can also use Financial Deal Management to associate opportunities, products, or tasks with a deal.

### NEW QUESTION # 34

Scott Adams is opening a joint savings account with his mom, Rachel Adams. Rachel Adams is the primary member of the Adams Household. Personal Banker Hank Burton wants to make sure that Scott's data is rolling up to the Adams Household. How can the Banker accomplish this?

- A. Make the Adams Household Scott's primary Group and make Scott the primary member
- B. Disable the Primary Group setting for Scott on the Adams Household
- C. Add Scott as a Related Contact to the Adams Household.
- D. Make the Adams Household Scott's primary Group and edit the Activities & Objects to Roll Up.

**Answer: D**

Explanation:

To make sure that Scott's data is rolling up to the Adams Household, the Banker should make the Adams Household Scott's primary Group and edit the Activities & Objects to Roll Up. A primary Group is a construct in Financial Services Cloud that allows you to define the main group for a client. You can use primary Group to roll up financial data from all the financial accounts that are related to the client or the group. By making the Adams Household Scott's primary Group, the Banker can ensure that Scott's financial data is included in the household summary. The Banker can also edit the Activities & Objects to Roll Up to specify which items, such as financial accounts, goals, or referrals, should be rolled up for Scott. Verified References: : Salesforce Help Article 4

### NEW QUESTION # 35

What actions can a Wealth Advisor take from the Life Events card?

- A. Create Lead & Referral
- B. Create Case
- C. Open an Account
- D. Request Record Approval
- E. Create Opportunity

**Answer: A,D,E**

Explanation:

From the Life Events card, a Wealth Advisor can take the following actions:

Create Lead & Referral: This action creates a lead record for a new prospector a referral record for an existing client based on the life event information.

Request Record Approval: This action initiates an approval process for the life event record to ensure compliance and quality standards.

Create Opportunity: This action creates an opportunity record to track the potential revenue from the life event. Verified References: : Salesforce Financial Services Cloud User Guide, page 30. : Salesforce Financial Services Cloud User Guide, page 31. : Salesforce Financial Services Cloud User Guide, page 32.

### NEW QUESTION # 36

A financial institution is concerned about contacting clients or sharing their data when they have requested not to be contacted. Which action should the consultant take in Financial Services Cloud to address the institution's concern?

- A. Hide the client's contact information and add an approval process for allowing a user to access it to contact the client.
- B. Implement Consent Management for Financial Services Cloud.
- C. Integrate the Consent object with their Consent Platform to track it in Salesforce.
- D. Enable and implement the Late Registration checkbox on the client record to track their request.

**Answer: B**

Explanation:

Consent Management for Financial Services Cloud is a feature that helps financial institutions honor and respect their customers' wishes when they request only specific forms of contact from their company or opt- out of certain types of data-sharing. This feature helps institutions comply with the data protection and privacy regulations that apply to their company<sup>1</sup>. A consultant can suggest the following actions to implement Consent Management for Financial Services Cloud:

Set up tracking and storage of certain data privacy preferences: This involves creating data privacy records for customers who have opted out of certain types of communication or data-sharing, and selecting the appropriate options in the record to indicate their preferences<sup>2</sup>.

Use the Consent API: This is an API that lets users query, create, update, or delete consent records for customers who have given or withdrawn their consent for certain types of communication or data-sharing.

Protect your Salesforce organization: This involves setting up organization-wide sharing settings, encryption, field-level security, and other measures to ensure that only authorized users can access or modify customer data according to their consent preferences.

References:

Consent Management for Financial Services Cloud

Set Up Tracking and Storage of Certain Data Privacy Preferences

[Use the Consent API]

[Protect Your Salesforce Organization]

### NEW QUESTION # 37

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