

# Free PDF 2026 Salesforce Marvelous Financial-Services-Cloud: Salesforce Financial Services Cloud (FSC) Accredited Professional Valid Torrent



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Salesforce FSC Accredited Professional Exam is designed to test the knowledge and skills of professionals who work in the financial services industry. Financial-Services-Cloud exam covers a wide range of topics, including financial services industry trends, regulatory compliance, customer engagement strategies, and sales and marketing techniques. Professionals who pass the exam demonstrate their proficiency in using the Salesforce Financial-Services-Cloud to help financial institutions achieve their business goals.

Salesforce Financial Services Cloud (FSC) Accredited Professional Exam is designed for professionals who work in the financial services industry and are looking to enhance their skills and knowledge in the Salesforce ecosystem. Financial-Services-Cloud Exam is specifically tailored to test a candidate's proficiency in using the Salesforce platform for financial services, including wealth management, banking, insurance, and lending.

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In addition to the recognition that comes with achieving Salesforce Financial Services Cloud Accredited Professional status, there are also tangible benefits. These include access to exclusive resources and training opportunities, as well as increased job opportunities and salary potential. With the financial services industry becoming increasingly reliant on technology, the demand for professionals with expertise in Salesforce Financial-Services-Cloud is only expected to grow.

## Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q51-Q56):

## NEW QUESTION # 51

What should a Financial Advisor use to model the relationship between a business contact and a client that is modeled as a person account?

- A. Contact-Contact Relationship and the Reciprocal Role
- B. Account-Contact Relationship and the Reciprocal Role
- C. Reciprocal Role
- D. Account-Account Relationship

**Answer: A**

Explanation:

Explanation

A Contact-Contact Relationship is a construct in Financial Services Cloud that allows you to model the relationship between two contacts, such as a business contact and a client that is modeled as a person account.

The Reciprocal Role is a field on the Contact-Contact Relationship object that defines how each contact relates to the other.

Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 64.

## NEW QUESTION # 52

A private equity company with only one administrator wants to upgrade Financial Services Cloud (FSC) from a Sales Cloud Unlimited Edition (UE) org. The company decided to install FSC greenfield on a new org to minimize the transfer of existing tech debt. In preparation for data migration, the administrator has been exporting backup files of the current org for a month.

What should the administrator do as part of the preparation for the data migration process?

- A. To start, the administrator can run a daily backup data export for a week, then continue to run this job weekly until they are ready for data migration.
- B. After running the backup data export manually for 2 weeks, the administrator can schedule this job to run weekly every Sunday to review the file on Mondays at the start of the week for data comparisons/analysis.
- C. As a dry run, the administrator can test this process via a data export request from the primary sandbox to the existing Sales Cloud UE org.
- D. The administrator can ask the business manager on the investment bank team to review the file directly.

**Answer: A**

Explanation:

As part of the preparation for the data migration process, the administrator should run a daily backup data export for a week, then continue to run this job weekly until they are ready for data migration. This is a best practice for data migration in Salesforce that allows the administrator to identify the data they want to migrate, create templates for the data, prepare the destination org, and validate the data. By running a daily backup data export for a week, the administrator can capture any changes or updates in the data and compare them with previous exports. By continuing to run this job weekly until they are ready for data migration, the administrator can ensure that they have the most recent and accurate data to migrate into Financial Services Cloud. Verified Reference: 2

## NEW QUESTION # 53

The Salesforce Administrator for Lake Tahoe Bank is receiving a report that a members Financial Account Balances are not adding up to the Financial Summary field in the related Household. Which two steps should the admin take to troubleshoot the issue?

- A. Ensure the reported Household is the Primary Group for the member
- B. Ensure the Primary Group flag in the Account record is checked.
- C. Ensure a RollUpByLookup batch job is scheduled to run every 15 mins.
- D. Ensure RollUpByLookup Configuration is Active
- E. Ensure that the member is the Primary Member in that Household

**Answer: A,D**

Explanation:

Explanation

To troubleshoot the issue of Financial Account Balances not adding up to the Financial Summary field in the related Household, the Admin should take the following steps:

Ensure RollUpByLookup Configuration is Active, which is a custom setting that enables or disables the Rollup By Lookup (RBL) feature. RBL is a feature that allows users to aggregate data from financial accounts and display it at the client and group levels<sup>1</sup>. Ensure the reported Household is the Primary Group for the member, which is a field on the Account object that indicates whether an account is the primary group for a contact or an individual. The primary group determines which financial summary fields are displayed on the contact or individual page<sup>2</sup>.

Verified References: 12

#### NEW QUESTION # 54

Lake Tahoe Bank would like to capture their commercial customers in FSC. A commercial customer can be owned by multiple groups. How can Lake Tahoe Bank SF Admin configure FSC to capture and display commercial customer and its parent company ? (3 correct answers)

- A. Capture the majority owner as parent account using Account hierarchy
- B. **Link multiple owners to the business entity as a Group**
- C. Enable Relationship Group Hierarchy in Custom Metadata
- D. **Leverage Groups to capture the majority owner and Account hierarchy to capture minority owner**
- E. **Add the Business record type to the Group record type mapper**

**Answer: B,D,E**

Explanation:

Explanation

To capture and display commercial customers and their parent companies, Lake Tahoe Bank SF Admin can use the following steps: Add the Business record type to the Group record type mapper, which is a custom metadata type that defines which record types can be added as members of a group<sup>1</sup>.

Leverage Groups to capture the majority owner of a commercial customer, which is a business entity that has a stake in another business entity<sup>1</sup>. Groups are a feature that allows users to create and manage household and business relationships<sup>1</sup>.

Use Account hierarchy to capture minority owners of a commercial customer, which are business entities that have less than 50% stake in another business entity<sup>2</sup>. Account hierarchy is a feature that allows users to see how accounts are related to each other in a parent-child relationship<sup>2</sup>.

Link multiple owners to the business entity as a Group, which allows users to see all the stakeholders of a commercial customer in one place<sup>1</sup>

#### NEW QUESTION # 55

Which of the following statement is true of Financial Services Cloud?

- A. **Financial Services Cloud sits on top of Sales and Service Cloud**
- B. Financial Services Cloud is for only Wealth Management companies
- C. Financial Services Cloud is an app you buy from AppExchange
- D. You need to assign only the Financial Services Cloud license before you can access the product features

**Answer: A**

#### NEW QUESTION # 56

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