

Quiz 2026 Salesforce Accurate Financial-Services-Cloud: Reliable Salesforce Financial Services Cloud (FSC) Accredited Professional Test Materials



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Salesforce Financial-Services-Cloud (FSC) Accredited Professional Certification Exam is a specialized exam designed for professionals who aim to validate their expertise in managing financial services on the Salesforce platform. The FSC Certification Exam is a comprehensive test that assesses a candidate's knowledge and skills in various financial services areas, including investments, banking, insurance, and wealth management. This credential is essential for individuals seeking to demonstrate their proficiency in using Salesforce Financial Services Cloud to deliver personalized financial advice and services to their clients.

>> **Reliable Financial-Services-Cloud Test Materials** <<

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Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q147-Q152):

NEW QUESTION # 147

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

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

Answer: D

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 # 148

Financial Services Cloud (FSC) contains a number of custom objects to model a client's financial information, and each object can be configured to appear as tabs in your org. For example, if a consultant wanted to create a financial goal for a customer, they could use the Financial Goal object in FSC.

What are three objects in FSC?

- A. Revenue
- B. Financial Goal
- C. Billing
- D. Inheritance
- E. Financial Holding

Answer: A,B,E

Explanation:

Financial Services Cloud contains a number of custom objects to model a client's financial information, and each object can be configured to appear as tabs in your org. Some of the custom objects are:

Financial Goal: An object that represents a client's financial objective, such as saving for retirement, buying a house, or paying off debt. A financial goal has fields to store information, such as name, amount, target date, priority, and status.

Financial Holding: An object that represents a holding in an investment account, such as a security, a mutual fund, or a bond. A financial holding has fields to store information, such as symbol, shares, price, gain/loss, and market value.

Revenue: An object that represents revenue generated from a client's financial accounts, such as an increase in stock value, a dividend payment, or an interest income. A revenue has fields to store information, such as type, amount, date, and source.

References:

Financial Services Cloud Associated Objects

Learn About the Financial Services Cloud Data Model

NEW QUESTION # 149

What is the maximum number of fields that can be displayed on the ARC Record Card?

- A. 0
- B. 1
- C. 2
- D. 3

Answer: A

NEW QUESTION # 150

Cumulus Cloud Bank needs help onboarding new customers. The business process requires updating the Know Your Customer (KYC) document checklist and performing internal tasks in a predefined order.

However, during an internal audit, it was found that bankers often miss these tasks and still move to the next stage of the onboarding process.

What should a consultant recommend?

- A. Utilize Chatter notifications for reminders.
- B. Utilize Financial Services Cloud flag Templates to flag missing items.
- C. Utilize Action Plan and Action Item Template.
- D. Create an after-save trigger to generate reminder tasks.

Answer: C

Explanation:

Explanation

To help onboarding new customers, the consultant should recommend using Action Plan and Action Plan Template. Action Plan is a feature in Financial Services Cloud that allows you to automate and standardize common business processes or service requests, such as customer onboarding, account opening, or loan origination. You can use Action Plan to create templates that define the tasks, owners, and deadlines for each process or request. You can also use Action Plan to enforce task dependencies and completion criteria, so that bankers cannot skip or miss any tasks or move to the next stage of the onboarding process without meeting the requirements. Verified References: : Salesforce Help Article 1 : Salesforce Help Article 2

NEW QUESTION # 151

How can the Salesforce Admin help agents who deal with a large number of customers on a daily basis, quickly scan the Life Events component and find the information they need without much effort?

- A. The user can change the color of important life events to red.
- B. The user can customize the order of life events to be set in chronological order
- C. The Admin can change the color of important life events to red.
- D. The Admin can customize the order of life events to be set in chronological order.

Answer: C

Explanation:

Explanation

The Admin can change the color of important life events to red by using custom CSS in a Lightning App Builder theme layout component. This way, the agents can quickly scan the Life Events component and find the information they need without much effort. The color red can draw attention and indicate urgency or importance for certain life events.

NEW QUESTION # 152

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