

2026 Pass-Sure AP-208: Practice Test Financial Services Cloud Accredited Professional Pdf



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Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q117-Q122):

NEW QUESTION # 117

During a Financial Services Cloud implementation at an insurance company, a consultant needs to design a broker data model for the broker web portal. The given requirements are:

1. Brokers are treated individually, even if they are associated with the same company.
2. Brokersshould never have access to other brokers' data.

3. Brokers can nominate their assistants to access the broker portal.
 4. An assistant can sometimes work for multiple brokers.
- Which two considerations should the consultant consider regarding the data model?

- A. The Broker Assistant should be modeled as a Contact. Then, leverage Contact to Multiple Account features if this assistant needs to work for multiple brokers.
- B. Brokers need to be modeled as Account and Contact individually, as each broker is a legal entity in Salesforce. Then, use a Group 1-1 Account to model their company.
- C. The Broker Assistant should be modeled as a Contact. Then, use Contact to Contact association if they need work for multiple D Brokers.
- D. Brokers should be modeled as Contact and the Broker company should be modeled as Account, even if they're a legal entity '-' individually.

Answer: A,B

Explanation:

The following considerations should be considered regarding the data model for the broker web portal:

The Broker Assistant should be modeled as a Contact. Then, leverage Contact to Multiple Account features if this assistant needs to work for multiple brokers. This is because Contacts are records that represent individuals who are associated with an account. By using Contacts, the consultant can capture the personal information of the broker assistants and relate them to their employers. By using Contact to Multiple Accounts features, the consultant can enable a contact to have relationships with multiple accounts and specify different roles and start and end dates for each relationship.

Brokers need to be modeled as Account and Contact individually, as each broker is a legal entity in Salesforce. Then, use a Group to model their company. This is because Accounts are records that represent business entities or organizations that are involved in business transactions with your company. By using Accounts, the consultant can capture the business information of each broker and treat them as legal entities in Salesforce. By using Contacts, the consultant can capture the personal information of each broker and relate them to their accounts. By using Groups, which are records that represent collections of accounts or contacts that share financial goals or characteristics, the consultant can model the broker company and associate multiple brokers with it.

NEW QUESTION # 118

Which three standard fields are available to track a customer's retirement goal progress?

- A. Actual value
- B. Target Date
- C. Target value
- D. Contributions
- E. Total Value

Answer: A,B,C

Explanation:

The following standard fields are available to track a customer's retirement goal progress:

Actual value, which is a currency field that represents the current value of the goal.

Target value, which is a currency field that represents the desired value of the goal.

Target Date, which is a date field that represents the expected date of achieving the goal.

NEW QUESTION # 119

A wealth management firm is looking to start tracking its clients' hobbies for marketing purposes in Salesforce. Which Financial Services Cloud feature is most suitable for this?

- A. Topics
- B. Interest Tags
- C. Alerts
- D. Engagement Topics

Answer: B

Explanation:

The Financial Services Cloud feature that is most suitable for tracking clients' hobbies for marketing purposes is Interest Tags.

Interest Tags are features that allow users to add tags to contacts or individuals based on their interests or preferences. Users can create custom interest tags or use predefined ones from FSC. By using Interest Tags, the wealth management firm can capture its clients' hobbies and use them for marketing segmentation or personalization.

NEW QUESTION # 120

A wealthy client owns aboutique shoe store called Smith's Shoes. Their financial advisor would like to add this relationship to the Financial Services Cloud (FSC) to track the complete picture of relationships related to the wealthy client's household.

Which three options should the Financial Services Cloud consultant use when mapping this relationship in FSC?

- A. Account Account Relationship object
- B. Account object - Businessrecord type
- C. Contact object
- D. Account object - Household record type
- E. Account Contact Relationship object

Answer: A,B,D

NEW QUESTION # 121

Our Personal Banker Hank Burton wants to encourage his customers to provide required documents for a loan application. He creates Document Checklist Items that help his customers to manage file uploads to speed up loan approval. For which of the following records does Salesforce support Document Checklist Items out of the box? (Choose Three)

- A. Opportunity
- B. Contact
- C. Account
- D. Residential Loan Application
- E. Lead

Answer: A,C,D

Explanation:

The following records support Document Checklist Items out of the box in Financial Services Cloud:

Account: An Account is a record that represents a person or an organization that has a business relationship with your company. You can use Document Checklist Items to request and track documents from your account holders, such as identity proofs, tax forms, or contracts.

Residential Loan Application: A Residential Loan Application is a record that represents a request for a loan to purchase or refinance a residential property. You can use Document Checklist Items to request and track documents from your loan applicants, such as income statements, credit reports, or property appraisals.

Opportunity: An Opportunity is a record that represents a potential sale or deal for your products or services.

You can use Document Checklist Items to request and track documents from your opportunity owners, such as proposals, quotes, or agreements. Verified References: : Salesforce Help Article 2 : Salesforce Help Article 3 : Salesforce Help Article 4

NEW QUESTION # 122

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