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## 2026 AP-208: High Hit-Rate Valid Financial Services Cloud Accredited Professional Study Notes

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## Salesforce Financial Services Cloud Accredited Professional Sample Questions (Q140-Q145):

### NEW QUESTION # 140

If a client is associated with more than one Household or Group, where will this client's records get rolled up to?

- A. to all the parent households and groups

- B. to the Household where the client is the primary member
- C. to the household with the client's primary address
- D. to the household selected by the advisor for record rollups.

**Answer: D**

Explanation:

If a client is associated with more than one Household or Group, their records will get rolled up to the household selected by the advisor for record rollups. A Household or Group is a construct in Financial Services Cloud that allows you to group related accounts together and view their aggregated financial data and activities. A client can belong to multiple Households or Groups, but only one of them can be selected as their primary Group for record rollups. The primary Group determines which Household or Group will display the client's records in its summary components or related lists. The advisor can select or change the primary Group for a client using the Primary Group field on the client's record page. Verified References: : Salesforce Help Article 6

#### NEW QUESTION # 141

A commercial loan due diligence process is handled by multiple individuals at Lake Tahoe Bank. Lake Tahoe Bank wants an easy way for managers to distribute the work, to understand the % completion of the due diligence process per client and report on the performance of the department to show possible bottlenecks.

What FSC feature can Lake Tahoe Bank use to track this process?

- A. Workflow Rules/Process Builder
- B. Action Plans
- C. Flows
- D. Apex Triggers on the task object

**Answer: B**

Explanation:

Again, Action Plans are a feature that can help users track and manage common client processes. For a commercial loan due diligence process, users can create an Action Plan Template with tasks such as verifying income, checking credit history, appraising collateral, etc. Users can also assign different task owners and deadlines for each task to distribute the work and monitor the progress. Users can also use dashboards and reports to view the % completion of the due diligence process per client and report on the performance of the department to show possible bottlenecks.

#### NEW QUESTION # 142

An advisor is setting up a Household in Financial Services Cloud for their new clients, Oliver and Macie Doggington. The advisor created a Person Account record for both Oliver and Macie, and a Household record for the Doggington household. While creating the Household group, the advisor attempted to input the below information but received an error.

Member Name: Oliver Doggington

Role in Group: Client

Primary Member: Enabled

Primary Group: Enabled

Activities and Objects to Roll Up: All

Member Name: Macie Doggington

Role in Group: Spouse

Primary Member: Enabled

Primary Group: Enabled

Activities and Objects to Roll Up: All

Based on the information provided, what caused the error that the advisor received?

- A. Spouse is not a valid Role within a Group.
- B. Primary Member - two individuals cannot be designated as the Primary Member of the same Household.
- C. Primary Group - two individuals cannot designate the same Household as their Primary Group.
- D. Activities and Objects to Roll Up - two individuals cannot designate their activities to roll up to the same Household.

**Answer: B**

Explanation:

Reference: [Customize Roles for Person Accounts and Individuals | Salesforce Help] Explanation: A primary member is the person

account who is the main contact for a household or a group.

Only one person account can be the primary member of a household or a group. The primary member is also used to calculate rollups for the household or group, such as total assets, liabilities, net worth, and so on. The advisor should designate either Oliver or Macie as the primary member of the Dogging ton household, but not both.

#### NEW QUESTION # 143

A consultant advising Cumulus Bank wants to ensure that the bank is compliant with Identity Verification Regulations when customers contact the bank.

Which two features should a consultant leverage to design this business process?

- A. Screen Flows
- B. Process Builder
- C. Discovery Framework
- D. Omni Studio

**Answer: A,B**

Explanation:

Process Builder and Screen Flows are two features that can be used to design a business process for identity verification. Process Builder is a tool that allows you to automate business processes by creating workflows that trigger actions based on certain criteria. Screen Flows are a type of flow that guide users through a series of screens to collect and update data. You can use Process Builder to launch a Screen Flow when a customer contacts the bank, and use the Screen Flow to capture and verify the customer's identity information.

References: [Process Automation], [Screen Flows]

#### NEW QUESTION # 144

An asset management firm that is moving to Salesforce from its old CRM wants to be able to bring over its client data on drivers' licenses and passports. 55m058 Which Financial Services Cloud object should a consultant recommend?

- A. Identification Document
- B. Identity Document
- C. Received Document
- D. Document Checklist Item

**Answer: A**

Explanation:

Identification Document is the Financial Services Cloud object that should be recommended for storing client data on drivers' licenses and passports. Identification Document is a standard object that represents a document that verifies a person's identity, such as a driver's license, passport, or national ID card. You can create identification document records for individual clients and link them to their person accounts. You can also store information such as document type, number, issue date, expiration date, and country of issuance.

References: [Identification Document Object], [Manage Identification Documents]

#### NEW QUESTION # 145

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