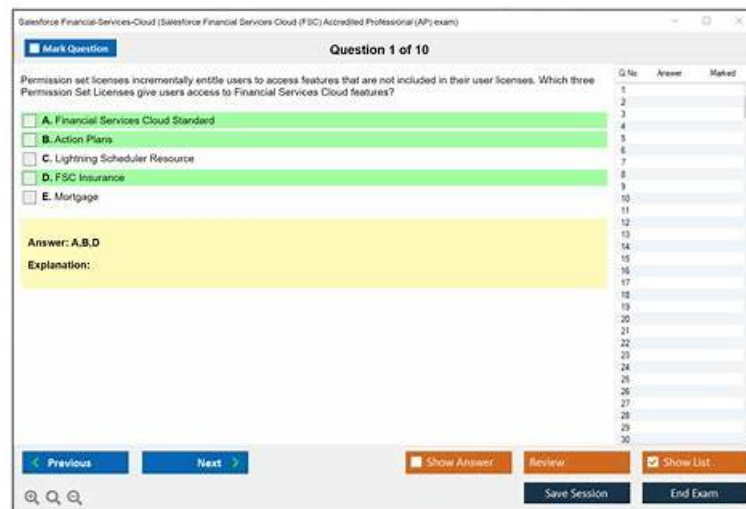


Salesforce Financial-Services-Cloud Exam dumps 2025



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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.

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Salesforce Financial Services Cloud Accredited Professional Exam is a challenging exam that requires a deep understanding of the Financial Services Cloud platform. Professionals who Pass Financial-Services-Cloud Exam are recognized as experts in the field and are well-equipped to help financial services organizations get the most out of the Salesforce Financial Services Cloud. Salesforce Financial Services Cloud (FSC) Accredited Professional certification is highly respected and is a valuable asset for professionals looking to advance their careers in the financial services industry.

Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q138-Q143):

NEW QUESTION # 138

A regional bank is implementing Financial Services Cloud (FSC). Today, relationship managers receive email reminders 2 days, 2 weeks, and 2 months after a new customer opens their first bank account to contact the customer for feedback. In addition, the bank wants the ability for relationship managers to track and report on progress in FSC.

What should the administrator do when designing the future state business process using FSC features?

- A. When a lead or referral is converted, create an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months.
- **B. When an account status is changed to "Customer", create an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months.**
- C. When creating an account, create an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months.
- D. When an account status is changed to "Customer", send emails to the Account Owner to follow up in 2 days, 2 weeks, and 2 months.

Answer: B

Explanation:

Explanation

To design the future state business process using FSC features, the administrator should create an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months when an account status is changed to "Customer". An action plan is a feature that allows users to create templates for common client processes, such as account opening, loan application, or financial review. An action plan template consists of action plan items that define the tasks, subtasks, and deadlines for each step of the process. By creating an action plan with tasks to follow up in 2 days, 2 weeks, and 2 months when an account status is changed to "Customer", the administrator can automate the email reminder process and track and report on the progress in FSC

NEW QUESTION # 139

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 Reference: : Salesforce Help Article 4

NEW QUESTION # 140

Planter Farm Credit Union provides loan and insurance products to farmers who operate individually as well as in collaboration with other neighboring farms & farmers. The collaboration can be seasonal or for a limited timeframe. What construct in Financial Services Cloud is most appropriate to represent such collaborative customer business operations?

- A. Contact-Contact Relationship
- **B. Custom Relationship Group**
- C. Account with Record Type = Business
- D. Standard Household

Answer: B

Explanation:

A Custom Relationship Group is a construct in Financial Services Cloud that allows you to model complex and dynamic relationships between clients and accounts. You can use it to represent collaborative customer business operations that are not captured by standard household or account structures. Verified References: : Salesforce Financial Services Cloud Implementation Guide, page 67.

NEW QUESTION # 141

Which accounts are automatically synchronized on Salesforce classic

- A. Accounts that the users own
- B. Accounts selected with the sync button
- C. Any account created in the last 30 days
- **D. All recently accessed accounts**

Answer: D

NEW QUESTION # 142

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

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

Answer: B,C,D

NEW QUESTION # 143

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