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It is a universally accepted fact that the Financial-Services-Cloud exam is a tough nut to crack for the majority of candidates, but there are still a lot of people in this field who long to gain the related certification so that a lot of people want to try their best to meet the challenge of the Financial-Services-Cloud Exam. A growing number of people know that if they have the chance to pass the exam, they will change their present situation and get a more decent job in the near future.

Salesforce Financial Services Cloud (FSC) Accredited Professional Sample Questions (Q149-Q154):

NEW QUESTION # 149

Our Personal Banker Hank Burton is learning to use Action Plans to ensure compliance in the client onboarding process. Where can Hank see Action Plan Tasks? (2 options)

- A. Hank will be able to see the Action Plan tasks on the related list of the Account page layout.
- B. Hank will be able to see the Action Plan Tasks assigned to him on the standard Salesforce task list.
- C. Hank will be able to see the Action Plan Tasks assigned to him on his calendar.
- D. Once the Action Plan is assigned, Hank can see the related Tasks on the Timeline.

Answer: A,B

Explanation:

Explanation

Hank can see Action Plan Tasks in two places:

On the related list of the Account page layout, where he can view all the tasks associated with an account and their status, due date, owner, and priority⁴.

On the standard Salesforce task list, where he can view all the tasks assigned to him across different accounts and filter them by various criteria.

NEW QUESTION # 150

Jen, the Financial Advisor at Lake Tahoe Wealth Management Company wants to modify a published Action Plan to support an additional task she needs in order to complete an annual review for a client. How should Jen do this?

- A. Create an independent Task not related to original Action Plan
- B. Use the 'task creator' tool to create a new task and associate with the existing Action Plan
- **C. Use the Action Plan item feature to add an additional task to a published Action Plan.**
- D. Contact her Salesforce Administrator and get her to make the change to the Action Plan for her.

Answer: C

NEW QUESTION # 151

What actions can a Wealth Advisor take from the Life Events card?

- **A. Create Opportunity**
- B. Open an Account
- **C. Create Lead & Referral**
- D. Create Case
- **E. Request Record Approval**

Answer: A,C,E

Explanation:

From the Life Events card, a Wealth Advisor can take the following actions:

Create Lead & Referral: This action creates a lead record for a new prospect or a referral record for an existing client based on the life event information.

Request Record Approval: This action initiates an approval process for the life event record to ensure compliance and quality standards.

Create Opportunity: This action creates an opportunity record to track the potential revenue from the life event. Verified Reference: : Salesforce Financial Services Cloud User Guide, page 30. : Salesforce Financial Services Cloud User Guide, page 31. : Salesforce Financial Services Cloud User Guide, page 32.

NEW QUESTION # 152

Which three things must an admin keep in mind when creating Action Plan Templates?

- **A. When you create an Action Plan from a template for a specific target record, item deadlines are calculated using the start date and date offset " defined in the Action Plan Template**
- **B. When you create an Action Plan from a template for a specific target record, the plan creator can choose whether the date calculation is based on calendar or working days.**
- C. The Action Plan Template permission set must be added to all users that want to use Action Plans.
- **D. An Action Plan is a run-time instance of the template that allows you to automate the sequence of the tasks you defined in the template.**
- E. When creating Action Plan Templates with the UI, you can designate a plan owner different from the plan creator.

Answer: A,B,D

NEW QUESTION # 153

A financial services company would like its users to be able to relate two business accounts. What should the administrator configure

to meet the requirement?

- A. Update the Role picklist on the Account-Account Relationship object with new value.
- B. Create a new Contact Reciprocal Role for the required value.
- C. Update the Role picklist on the Account-Contact Relationship object with new value.
- D. Create a new Account Reciprocal Role for the required value.

Answer: A

Explanation:

To configure Financial Services Cloud to allow users to relate two business accounts, the administrator should update the Role picklist on the Account-Account Relationship object with new value. The Role picklist is a field on the Account-Account Relationship object that defines the type of relationship between two accounts, such as Household Member, Business Owner, Trustee, or Friend. The Role picklist is used to filter and display the account-account relationships in the Actionable Relationship Center (ARC). To update the Role picklist, you need to go to Setup > Object Manager > Account-Account Relationship > Fields & Relationships > Role and add or remove values according to your business needs. Verified References: : Salesforce Help Article [10] : Salesforce Help Article [11]

NEW QUESTION # 154

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