Financial Services Cloud Object Reference Guide

Salesforce, Spring '16

CONTENTS

USAGE OF FINANCIAL SERVICES CLOUD FIELDS AND OBJECTS

Refer to the fields and objects that extend Salesforce for Financial Services Cloud. They are available in API version 36.0 for the Financial Services Cloud managed package version 1.0.

Fields and objects in the package have the `FinServ` namespace prefix. For example, `FinServ__IndividualId__c` is a custom field on Account. `FinServ__FinancialAccount__c` is a custom object. To refer to the standard Salesforce objects, see the *Object Reference for Salesforce*.

Some fields may not be listed for some objects. To verify the complete list of fields for an object, use a describe call from the API, inspect the WSDL, or use a schema viewer.

Account Custom Fields

Represents information about a client that pertains to their dealings with your firm, such as their review frequency or service tier. Custom fields extend the standard Account object for use in Financial Services Cloud.

Fields

Field Name	Details
`AUM__c`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of client's financial accounts that our firm manages. Calculated as the sum of `TotalAUMPrimaryOwner__c` and `TotalAUMJointOwner__c`.
`ClientCategory__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Rates the value of the client's business with our firm. Label is `Category`. Valid values: • Platinum • Gold • Silver • Bronze
`FinancialInterests__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Client's financial areas of interest. Valid values: • Municipal Bonds • Fixed Income • Energy

Field Name	Details
	- Technology - CRM - AAPL - GOOG - Retirement - College Planning
IndividualId__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Read only. Unique ID that relates this individual's account record to its contact record.
InvestmentExperience__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client's investment experience. Valid values: - Experienced - Moderately Experienced - Moderately Inexperienced - Inexperienced
InvestmentObjectives__c	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Client's preference for growth versus income investments. Valid values: - Conservative Income - Income - Balanced - Growth - Aggressive Growth
LastInteraction__c	**Type** date

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last client meeting or call.
LastReview__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last client review.
MarketingSegment__c	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Market segments that characterize the client. Valid values: • Mass Affluent • High Net Worth • Female Investor • Millennial
NetWorth__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Value of the client's assets minus liabilities.
NextInteraction__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the next client meeting or call.
NextReview__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Date of the next client review.
Notes__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Important notes about the client. Label is `Important Notes`.
PersonalInterests__c	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Client's personal areas of interest. Valid values: • Cooking • College Basketball • Environment • Hiking • Biking • Wine
PrimaryContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Read only. ID of the contact record associated with this individual's account record.
ReviewFrequency__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Frequency of client reviews. Valid values: • Monthly • Quarterly • Annually

Field Name	Details
RiskTolerance__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Level of risk the client is comfortable with. Valid values: - Aggressive - Conservative - Moderate - None
ServiceModel__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Service level assigned to client. Valid values: - Tier 1 - Tier 2 - Tier 3
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the client in an external data source.
Status__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client's status with your firm. Valid values: - Prospect - Onboarding - Active - Deceased - Inactive

Field Name	Details
TimeHorizon__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client's investment time frame. Valid values: • Long Term • Medium Term • Short Term
TotalAUMJointOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's financial accounts that our firm manages, for which the client is the joint owner of jointly owned accounts.
TotalAUMPrimaryOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's financial accounts that our firm manages, for which the client is the primary owner of either individually owned or jointly owned accounts.
TotalBankDeposits__c	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of client's bank accounts. Calculated as the sum of TotalBankDepositsPrimaryOwner__c and TotalBankDepositsJointOwner__c.
TotalBankDepositsJointOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's bank accounts, for which the client is the joint owner of jointly owned accounts.

Field Name	Details
TotalBankDepositsPrimaryOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's bank accounts, for which the client is the primary owner of either individually owned or jointly owned accounts.
TotalFinAcctsJointOwner__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total value of financial account balances (excluding insurance policies), for which the client is the joint owner of jointly owned accounts. Label is `Total Financial Accounts Joint Owner`.
TotalFinAcctsPrimaryOwner__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total value of financial account balances (excluding insurance policies), for which the client is the primary owner of either individually owned or jointly owned accounts. Label is `Total Financial Accounts Primary Owner`.
TotalFinancialAccounts__c	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of all financial accounts, excluding insurance policies. Calculated as the sum of `TotalBankDeposits__c` and `TotalInvestments__c`.
TotalHeldFinAcctsJointOwner__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total value of held financial account balances, for which the client is the joint owner of jointly owned accounts. Label is `Total Held Financial Accounts Joint`.

Field Name	Details
`TotalHeldFinAcctsPrimaryOwner__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total value of held financial account balances, for which the client is the primary owner of either individually owned or jointly owned accounts. Label is `Total Held Financial Accounts Primary`.
`TotalInsurance__c`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of client's insurance policies. Calculated as the sum of `TotalInsurancePrimaryOwner__c` and `TotalInsuranceJointOwner__c`.
`TotalInsuranceJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's insurance policies, for which the client is the joint owner of jointly owned accounts.
`TotalInsurancePrimaryOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's insurance policies, for which the client is the primary owner of either individually owned or jointly owned accounts.
`TotalInvestments__c`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of client's investment accounts. Calculated as the sum of `TotalInvestmentsPrimaryOwner__c` and `TotalInvestmentsJointOwner__c`.

Field Name	Details
TotalInvestmentsJointOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's investment accounts, for which the client is the joint owner of jointly owned accounts.
TotalInvestmentsPrimaryOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's investment accounts, for which the client is the primary owner of either individually owned or jointly owned accounts.
TotalLiabilities__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Value of client's liabilities, stored as a negative value. Calculated as the sum of TotalLiabilitiesPrimaryOwner__c and TotalLiabilitiesJointOwner__c.
TotalLiabilitiesJointOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's liabilities, for which the client is the joint owner of jointly owned liabilities.
TotalLiabilitiesPrimaryOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's liabilities, for which the client is the primary owner of either individually owned or jointly owned liabilities.

Field Name	Details
TotalNonfinancialAssets__c	**Type** double **Properties** Filter, Nillable, Sort **Description** Value of client's tangible assets such as collectibles or precious metals. Calculated as the sum of `TotalNonfinancialAssetsPrimaryOwner__c` and `TotalNonfinancialAssetsJointOwner__c`.
TotalNonfinancialAssetsJointOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's tangible assets such as collectibles or precious metals, for which the client is the joint owner of jointly owned assets.
TotalNonfinancialAssetsPrimaryOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of client's tangible assets such as collectibles or precious metals, for which the client is the primary owner of either individually owned or jointly owned assets.
WalletShare__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Read only. Percentage of client's financial assets that our firm manages or administers. Calculated as the percent of financial accounts that are held (`FinancialAccount__c.HeldAway` is false).

AccountAccountRelation

Represents a relationship between two accounts, such as between a household and a business account.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
`Account__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Account that `RelatedAccount__c` is related from.
`Active__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the relationship is active (`true`) or not (`false`). The default value is `true`.
`EndDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship ended.
`ExternalId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the relationship in an external data source.
`Name`	**Type** string **Properties** Defaulted on create, Filter, idLookup, Sort **Description** Auto-number identifier for the relationship. Label is `Account Relation Name`.

Field	Details
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the relationship record.
RelatedAccount__c	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** Account that `Account__c` is related to.
Role__c	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Role that describes how `RelatedAccount__c` is related to `Account__c`.
StartDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship started.

AccountContactRelation Standard and Custom Fields

Represents the relationship between an individual (specifically the contact part of the individual) and the household (account) that the individual is a member of. AccountContactRelation is a standard object that is available through the Shared Contacts feature. Custom fields extend the AccountContactRelation standard object for use in Financial Services Cloud.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `update()`, `upsert()`

Fields

Field	Details
AccountId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the household (account) that the individual is a member of.
ContactId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the contact that partially represents the individual.
EndDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the individual's status as a household member is no longer in effect.
IsActive	**Type** boolean **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Indicates whether the individual's status as a household member is in effect (`true`) or not (`false`). Label is `Active`.
IsDirect	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the account-to-contact relationship is direct, which means that it relates the account and contact parts of an individual to represent a single individual (`true`). Otherwise, the relationship is indirect, which means that it relates the contact part of an individual to the household the individual belongs to (`false`). Label is `Direct`.

Field	Details
Roles	**Type** picklist **Properties** Create, Filter, Nillable, Update **Description** Role that the individual plays within the household. Valid values: • Influencer • Evaluator • Business User • Technical Buyer • Economic Buyer • Other • Decision Maker • Economic Decision Maker • Executive Sponsor Note: Replace these default picklist values with appropriate values for the roles that clients occupy within households, such as client, spouse, domestic partner, and dependent.
StartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the individual's status as a household member took effect.
Primary__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the individual is the primary member of the household (`true`) or not (`false`).
Rollups__c	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Records associated with the individual that are included in household roll-up summaries. Valid values:

Field	Details
	• Tasks
	• Events
	• Financial Accounts
	• Assets and Liabilities
	• Financial Goals

AssetsAndLiablities

Represents assets or liabilities that are not represented in a client's financial accounts, such as real estate or collectibles.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
`Amount__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount of an asset (positive) or liability (negative).
`AssetsAndLiabilitiesSource__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Data source. Label is `Source`. Valid values: • Manual Entry • Yodlee
`AssetsAndLiabilitiesType__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Type of asset or liability. Label is `Type`. Valid values: • Auto Loan • Mortgage • Other • Personal Loan • Real Estate • Equipment • Automobile • Collection • Gold • Jewelry • Cash
Description__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of this asset or liability.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial account that this asset or liability is related to.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Household that this asset or liability is associated with.
JointOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details

| | **Description** |
| | Joint owner, if any, for this asset or liability. |

`LastReferencedDate`	**Type**
	date
	Properties
	Filter, Nillable, Sort,
	Description
	Timestamp for when the current user last viewed a record related to this record.

`LastViewedDate`	**Type**
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Timestamp for when the current user last viewed this record.

`Name`	**Type**
	string
	Properties
	Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	Name of this asset or liability.

`OwnerId`	**Type**
	reference
	Properties
	Create, Defaulted on createFilter, Group, Sort, Update
	Description
	ID of the user who created the asset or liability record.

`Ownership__c`	**Type**
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Type of ownership for this asset or liability. Valid values:
	• Individual
	• Joint
	• Trust

Field	Details
OwnerType__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client's ownership role (primary or joint) for this asset or liability. The value is specified by a trigger.
PrimaryOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Primary owner of this asset or liability.
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the record type associated with this asset or liability.

Contact Custom Fields

Represents information about a client that pertains to their personhood, irrespective of their relationship with your firm, such as their birthdate or tax ID number. Custom fields extend the Contact object for use in Financial Services Cloud.

Fields

Field Name	Details
Age__c	**Type** double **Properties** Filter, Nillable, Sort **Description** Age. Calculated from `Contact.Birthdate`.
AgeAsText__c	**Type** string

Field Name	Details
	Properties Filter, Nillable, Sort **Description** Age expressed in years, months, and days. Calculated from `Contact.Birthdate`. Label is **Age Text**.
`AnnualIncome__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual income.
`BillingAddress__c`	**Type** string **Properties** Filter, Nillable, Sort **Description** The compound form of the billing address. Based on these address fields: `Account.BillingStreet`, `Account.BillingCity`, `Account.BillingState`, `Account.BillingPostalCode`, and `Account.BillingCountry`.
`Citizenship__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Citizenship.
`CountryOfResidence__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Country of primary residence.
`CurentEmployer__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Name of current employer.
EmployedSince__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Tenure with current employer.
Facebook__c	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Facebook profile URL.
Gender__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Gender. Valid values: • Female • Male • Other
IndividualId__c	**Type** string **Properties** Filter, Nillable, Sort **Description** Unique ID that relates this individual's contact record to its account record. Calculated from `Account.IndividualId__c`.
LanguagesSpoken__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Languages spoken.

Field Name	Details
LinkedIn__c	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** LinkedIn profile URL.
MailingAddress__c	**Type** string **Properties** Filter, Nillable, Sort **Description** The compound form of the mailing address. Based on these address fields: `MailingStreet`, `MailingCity`, `MailingState`, `MailingPostalCode`, and `MailingCountry`.
MaritalStatus__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Marital status. Valid values: • Single • Married • Separated • Divorced • Widowed
NumberOfDependents__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of dependents, such as spouse and dependent children.
Occupation__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Occupation.

Field Name	Details
OtherAddress__c	**Type** string **Properties** Filter, Nillable, Sort **Description** The compound form of the other address. Based on these address fields: `OtherStreet`, `OtherCity`, `OtherState`, `OtherPostalCode`, and `OtherCountry`.
PrimaryAddressIsBilling__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the billing address is the client's primary address (`true`) or not (`false`).
PrimaryAddressIsMailing__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the mailing address is the client's primary address (`true`) or not (`false`).
PrimaryAddressIsOther__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the other address is the client's primary address (`true`) or not (`false`).
PrimaryAddressIsShipping__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the shipping address is the client's primary address (`true`) or not (`false`).
ShippingAddress__c	**Type** string **Properties** Filter, Nillable, Sort

Field Name	Details
	Description The compound form of the shipping address. Based on these address fields: `Account.ShippingStreet`, `Account.ShippingCity`, `Account.ShippingState`, `Account.ShippingPostalCode`, and `Account.ShippingCountry`.
`TaxBracket__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Rate at which the individual is taxed. Valid values: • 10% • 15% • 25% • 28% • 33% • 35%
`TaxId__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Tax Identification Number or Social Security Number.
`Twitter__c`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Twitter profile URL.
`WeddingAnniversary__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of wedding anniversary.

ContactContactRelation

Represents the relationship between any two individuals.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
`Active__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the relationship is active (`true`) or not (`false`). The default value is `true`.
`Contact__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Contact that `RelatedContact__c` is related from.
`EndDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship ended.
`ExternalId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the relationship in an external data source.

Field	Details
Name	**Type** string **Properties** Defaulted on create, Filter, idLookup, Sort **Description** Auto-number identifier for the relationship. Label is `Contact Relation Name`.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the relationship record.
RelatedContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Contact that `Contact__c` is related to.
Role__c	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Role that describes how `RelatedContact__c` is related to `Contact__c`
StartDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship started.

Event Custom Fields

Represents an event associated with a client. Custom fields extend the standard Event object for use in Financial Services Cloud.

Fields

Field Name	Details
Expectations__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client expectations that this event relates to.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the household associated with the client.
NextSteps__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Next steps for this client event.
Objectives__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client objectives that this event relates to.
Regarding__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The nature of this client event. Valid values: • Prospecting • Onboarding • Client Retention • Service

FinancialAccount

Represents a financial account such as an investment account, bank account, or insurance policy.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field	Details
Address1__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Street address line 1 for mailing address.
Address2__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Street address line 2 for mailing address.
ApplicationDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the client submitted the financial account application.
AssetRebalance__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Sort, Update **Description** Indicates whether automatic portfolio rebalancing applies to this financial account (true) or not (false).

Field	Details
AverageBalance__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Average amount of money in the financial account, over a time period.
Balance__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Amount of money in the financial account.
CashBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Cash available in the financial account.
City__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** City for mailing address.
CloseDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when this financial account was closed.
Country__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Country for mailing address.

Field	Details
Description__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the financial account.
Discretionary__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the advisor has discretionary trading authority for this financial account (`true`) or not (`false`).
FinancialAccountNumber__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the financial account in an external data source. Label is `Account Number`.
FinancialAccountSource__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Data source. Label is `Source`. Valid values: • Integrator • Manual Entry • Pending
FinancialAccountType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of financial account. Label is `Type`. Valid values: • 401(a) • 401(k)

Field	Details
	• 403(b)
	• 529 Plan
	• Brokerage
	• Cash Management Account
	• CD
	• Checking
	• Credit Card
	• Discount Brokerage
	• Fixed Annuity
	• Individual Life
	• IRA
	• Mutual Fund
	• Profit Sharing
	• Rollover IRA
	• Roth IRA
	• Savings
	• Term Life
	• Variable Life
	• Whole Life
HeldAway__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this financial account is managed or administered externally (`true`) or in-house (`false`).
HoldingCount__c	**Type** double **Properties** Filter, Nillable, Sort **Description** Number of holdings within this financial account. Calculated by roll-up summary. Label is `Number of Holdings`.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Household that this financial account rolls up to.
InsuredAmount__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The insured value that an insurance policy covers.
InvestmentObjectives__c	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Purpose of this financial account. Valid values: • Safety • Income • Growth • Tax Optimization • Liquidity
JointOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Joint owner of this financial account.
LastActivityDate	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** Timestamp for when this financial account last had a task or event action associated with the record.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description Timestamp for when the current user last viewed a record related to this record.
LastUpdated__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when data for this financial account was last updated by an external data source.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
Managed__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this financial account is managed or administered by our firm (`true`) or not (`false`).
MinimumBalance__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Minimum balance requirement for this financial account.
ModelPortfolio__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Model asset allocation for this financial account. Valid values: • Conservative • Moderate

Field	Details
	• Balanced
	• Growth
	• Aggressive
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of this financial account.
OpenDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when this financial account was opened.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the financial account record.
Ownership__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of ownership for this financial account. Valid values: • Individual • Joint • Trust
OwnerType__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client's ownership role (primary or joint) for this financial account.

Field	Details
PaperlessDelivery__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Client elects to receive electronic delivery of financial account documents (`true`) or not (`false`).
Performance1Yr__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past year.
Performance3Yr__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past three years.
PerformanceMTD__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past month-to-date.
PerformanceQTD__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past quarter-to-date.
PerformanceYTD__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Performance measured over the past calendar year-to-date.
PostalCode__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Postal code for mailing address.
Premium__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount paid to the insurer for insurance policy coverage.
PrimaryOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Primary owner of this financial account.
RebalanceFrequency__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Frequency of portfolio rebalancing for this financial account. Valid values: - Monthly - Quarterly - Semiannually - Annually
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the record type associated with this financial account.

Field	Details
RecordTypeName__c	**Type** string **Properties** Filter, Nillable, Sort **Description** Record type for this financial account. The value is copied from `RecordType.Name` and can't be changed. Label is `Record Type`.
RenewalDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when insurance policy renewal is due.
ServiceProvider__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Custodian or recordkeeper of this financial account.
State__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** State for mailing address.
Status__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of this financial account. Valid values: • Open • Closed • On Hold • Pending

Field	Details
TaxID__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Tax Identification Number associated with this financial account.
TaxStatus__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of tax treatment this financial account qualifies for. Valid values: • Nonqualified • Qualified
TimeHorizon__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Investment time frame for this financial account. Valid values: • Long Term • Medium Term • Short Term

FinancialAccountRole

Represents the role occupied by a person or organizational entity that is involved with a financial account, such as a beneficiary or trustee.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
Active__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the organizational entity or person currently occupies this role (`true`) or not (`false`).
Editable__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this field is editable (`true`) or not (`false`).
EndDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** End date when the organizational entity or person relinquished this role.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Financial account that this role is related to.
Name	**Type** string **Properties** Defaulted on create, Filter, idLookup, Sort **Description** Name of the financial account role.
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	ID of the record type associated with this financial account role.
RelatedAccount__c	**Type**
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Name of the organizational entity that is involved with the financial account.
RelatedContact__c	**Type**
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Name of the person who is involved with the financial account.
Role__c	**Type**
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Role that describes how the organizational entity or person is involved with the financial account. Valid values:
	When the record type is set to Account Role:
	• Corporation
	• Foundation
	When the record type is set to Contact Role:
	• Trustee
	• Beneficiary
	• Grantor
	• Accountant
	• Business Manager
StartDate__c	**Type**
	date
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	Start date when the organizational entity or person assumed this role. The default value is the current date.

FinancialGoal

Represents a client's financial goal, such as college funds or a major purchase.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
`ActualValue__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current amount saved toward goal.
`CompletionDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the goal was reached.
`Description__c`	**Type** textarea **Properties** Create, Nillable, Update **Description** Description of the goal.
`Household__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Household that this goal is associated with.
`InitialValue__c`	**Type** currency

Field	Details
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Starting amount saved toward goal.
LastActivityDate	**Type**
	date
	Properties
	Filter, Group, Nillable, Sort
	Description
	Timestamp for when this goal last had a task or event action associated with the record.
LastReferencedDate	**Type**
	date
	Properties
	Filter, Nillable, Sort,
	Description
	Timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type**
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Timestamp for when the current user last viewed this record.
Name	**Type**
	string
	Properties
	Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	Name of this goal.
OwnerId	**Type**
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	ID of the user who created the financial goal record.
PrimaryOwner__c	**Type**
	reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Primary owner of this goal.
Status__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of goal. Valid values: • Completed • In Progress • Not Started
TargetDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the goal is expected to be reached.
TargetValue__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount required for the goal.
Type__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Purpose of goal. Valid values: • Education • Home Purchase • Other • Retirement

FinancialHolding

Represents a financial holding in an investment account, such as shares of stock.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AssetCategory__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Subcategory of asset type. Valid values: • U.S. Equity • Sector Equity • Allocation • International Equity • Alternative • Commodities • Taxable Bond • Municipal Bond
AssetCategoryName__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Market capitalization and investing style. Valid values: • Large Growth • Large Value • Large Blend • Small Growth • Small Value • Small Blend • Mid-Cap Growth • Mid-Cap Value

Field	Details
	• Mid-Cap Blend
AssetClass__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Major category of asset type. Valid values: • Equities • Fixed Income • Cash Equivalents • Alternative Investments
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Financial account that this holding is related to.
GainLoss__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Change in value since purchase.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Household that this holding rolls up to.
LastActivityDate	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** Timestamp for when this financial holding last had a task or event action associated with the record.

Field	Details
LastReferencedDate	**Type** date **Properties** Filter, Nillable, Sort, **Description** Timestamp for when the current user last viewed a record related to this record.
LastUpdated__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when data for this holding was last updated by an external data source.
LastViewedDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when the current user last viewed this record.
MarketValue__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current market value.
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of this holding.
PercentChange__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Percent change in value since purchase.

Field	Details
Price__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current price per share.
PrimaryOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Primary owner of this holding.
PurchasePrice__c	**Type** currency **Properties** Create, Filter, Sort, Update **Description** Price per-share at time of purchase.
Shares__c	**Type** double **Properties** Create, Filter, Sort, Update **Description** Number of shares held.
Symbol__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Ticker symbol for the securities held.

LifeEvent

Represents a client's life event, such as a birth or marriage. Reserved for future use.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Fields

Field	Details
Client__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client that the life event is related to.
DiscussionNote__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Notes from client discussions.
EventDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the life event.
EventType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of life event. Valid values: - College - New Baby - New Business - New Home - New Job - Retirement

Field	Details
FinancialGoal__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial goal that the life event is related to.
GoalType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of financial goal implied by the life event. Valid values: • Saving for College • Saving for Retirement

ReciprocalRole

Represents the other entity's corresponding role in a one-to-one relationship between entities. Reserved for Salesforce internal use.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field	Details
InverseRole__c	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The role that the other entity occupies in the relationship, such as a grandparent to a grandchild, or an owned business to a proprietor.
LastReferencedDate	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of this reciprocal role.
OwnerId	**Type** reference **Properties** Create, Defaulted on createFilter, Group, Sort, Update **Description** ID of the user who created the reciprocal role record.
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the record type associated with this reciprocal role.
RelationshipType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of entities involved in the relationship. Valid values: • All • Contact Contact Relation

Field	Details
	• Account Account Relation

Securities

Represents a security, such as a stock or bond.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
`CUSIP__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Committee on Uniform Securities Identification Procedures identification number for the securities.
`Exchange__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Exchange on which the securities are traded. Valid values: • NYSE • NASDAQ
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
`LastUpdated__c`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Timestamp for when data for the securities was last updated by an external data source.
LastViewedDate	**Type** dateTime
	Properties Filter, Nillable, Sort
	Description Timestamp for when the current user last viewed this record.
Name	**Type** string
	Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update
	Description Name of the securities.
OwnerId	**Type** reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description ID of the user who created the securities record.
Price__c	**Type** currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Current price of the securities.
SecuritiesName__c	**Type** string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Name that uniquely identifies the securities.
SecurityId__c	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of the securities.

Task Custom Fields

Represents a task associated with a client. Custom fields extend the standard Task object for use in Financial Services Cloud.

Fields

Field Name	Details
Expectations__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client expectations that this task relates to.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the household associated with the client.
NextSteps__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Next steps for this client task.
Objectives__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client objectives that this task relates to.

Field Name	Details
Regarding__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The nature of this client task. Valid values: • Prospecting • Onboarding • Client Retention • Service