



Financial Services Cloud Developer Guide

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FINANCIAL SERVICES CLOUD DEVELOPER GUIDE

Use the fields, objects, and metadata that extend Salesforce for Financial Services Cloud. Trigger information is also provided.

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](#).


FINANCIAL SERVICES CLOUD STANDARD AND CUSTOM OBJECTS

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	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Value of client's financial accounts that our firm manages. Calculated as the sum of <code>TotalAUMPrimaryOwner__c</code> and <code>TotalAUMJointOwner__c</code>.</p>
ClientCategory__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Rates the value of the client's business with our firm. Label is <code>Category</code>. Valid values:</p> <ul style="list-style-type: none">• Platinum• Gold• Silver• Bronze
FinancialInterests__c	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Client's financial areas of interest. Valid values:</p> <ul style="list-style-type: none">• Municipal Bonds• Fixed Income• Energy

Field Name	Details
	<ul style="list-style-type: none"> • Technology • CRM • AAPL • GOOG • Retirement • College Planning
IndividualId__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Read only. Unique ID that relates this individual's account record to its contact record.</p>
IndividualType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of individual. Valid values:</p> <ul style="list-style-type: none"> • Individual • Group • (Blank) - If this value is blank, then the Individual Type is Business. <p> Note: This field is for Salesforce internal-use only. This field can't be changed.</p>
InvestmentExperience__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Client's investment experience. Valid values:</p> <ul style="list-style-type: none"> • Experienced • Moderately Experienced • Moderately Inexperienced • Inexperienced
InvestmentObjectives__c	<p>Type multipicklist</p>

Field Name	Details
	<p>Properties Create, Filter, Nillable, Update</p> <p>Description Client's preference for growth versus income investments. Valid values:</p> <ul style="list-style-type: none"> • Conservative Income • Income • Balanced • Growth • Aggressive Growth
LastInteraction__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of the last client meeting or call.</p>
LastReview__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of the last client review.</p>
MarketingSegment__c	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Market segments that characterize the client. Valid values:</p> <ul style="list-style-type: none"> • Mass Affluent • High Net Worth • Female Investor • Millennial
NetWorth__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field Name	Details
	<p>Description Value of the client's assets minus liabilities.</p>
NextInteraction__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of the next client meeting or call.</p>
NextReview__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of the next client review.</p>
Notes__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Important notes about the client. Label is <code>Important Notes</code>.</p>
PersonalInterests__c	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Client's personal areas of interest. Valid values:</p> <ul style="list-style-type: none"> • Cooking • College Basketball • Environment • Hiking • Biking • Wine
PrimaryContact__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p>Description Read only. ID of the contact record associated with this individual's account record.</p>
ReviewFrequency__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Frequency of client reviews. Valid values:</p> <ul style="list-style-type: none"> • Monthly • Quarterly • Annually
RiskTolerance__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Level of risk the client is comfortable with. Valid values:</p> <ul style="list-style-type: none"> • Aggressive • Conservative • Moderate • None
ServiceModel__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Service level assigned to client. Valid values:</p> <ul style="list-style-type: none"> • Tier 1 • Tier 2 • Tier 3
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the client in an external data source.</p>

Field Name	Details
Status__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Client's status with your firm. Valid values:</p> <ul style="list-style-type: none"> • Prospect • Onboarding • Active • Deceased • Inactive
TimeHorizon__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Client's investment time frame. Valid values:</p> <ul style="list-style-type: none"> • Long Term • Medium Term • Short Term
TotalAUMJointOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Total value of client's financial accounts that our firm manages, for which the client is the joint owner of jointly owned accounts.</p>
TotalAUMPrimaryOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>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.</p>
TotalBankDeposits__c	<p>Type currency</p>

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

Field Name	Details
TotalFinancialAccounts__c	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Value of all financial accounts, excluding insurance policies. Calculated as the sum of TotalBankDeposits__c and TotalInvestments__c.</p>
TotalHeldFinAcctsJointOwner__c	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>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.</p>
TotalHeldFinAcctsPrimaryOwner__c	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>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.</p>
TotalInsurance__c	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Value of client's insurance policies. Calculated as the sum of TotalInsurancePrimaryOwner__c and TotalInsuranceJointOwner__c.</p>
TotalInsuranceJointOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Total value of client's insurance policies, for which the client is the joint owner of jointly owned accounts.</p>

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

Field Name	Details
TotalLiabilitiesJointOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Total value of client's liabilities, for which the client is the joint owner of jointly owned liabilities.</p>
TotalLiabilitiesPrimaryOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Total value of client's liabilities, for which the client is the primary owner of either individually owned or jointly owned liabilities.</p>
TotalNonfinancialAssets__c	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Value of client's tangible assets such as collectibles or precious metals. Calculated as the sum of TotalNonfinancialAssetsPrimaryOwner__c and TotalNonfinancialAssetsJointOwner__c.</p>
TotalNonfinancialAssetsJointOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>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.</p>
TotalNonfinancialAssetsPrimaryOwner__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>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.</p>

Field Name	Details
WalletShare__c	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>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 (<code>FinancialAccount__c.HeldAwayis false</code>).</p>

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	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Account that <code>RelatedAccount__c</code> is related from.</p>
Active__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the relationship is active (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
EndDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the relationship ended.</p>
ExternalId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the relationship in an external data source.</p>
InverseRelationship__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Uniquely identifies the relationship between <code>Account</code> and <code>RelatedAccount__c</code> so that it can be referenced by a trigger that creates the inverse relationship record.</p>
Name	<p>Type string</p> <p>Properties Defaulted on create, Filter, idLookup, Sort</p> <p>Description Auto-number identifier for the relationship. Label is <code>Account Relation Name</code>.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record.</p>
RelatedAccount__c	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description Account that Account__c is related to.</p>
Role__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Role that describes how RelatedAccount__c is related to Account__c.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the relationship in an external data source.</p>
StartDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the relationship started.</p>

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	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the household (account) that the individual is a member of.</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the contact that partially represents the individual.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the individual's status as a household member is no longer in effect.</p>
IncludeInGroup__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Includes this account in a related individual's primary group.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Indicates whether the individual's status as a household member is in effect (<code>true</code>) or not (<code>false</code>). Label is <code>Active</code>.</p>
<code>IsDirect</code>	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Defaulted on create, Filter, Group, Sort</p> <p>Description</p> <p>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 (<code>true</code>). Otherwise, the relationship is indirect, which means that it relates the contact part of an individual to the household the individual belongs to (<code>false</code>). Label is <code>Direct</code>.</p>
<code>Primary__c</code>	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Indicates the primary member of a group (<code>true</code>) or not (<code>false</code>).</p>
<code>PrimaryGroup__c</code>	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Indicates a person's primary group. You can roll up summary fields only to a person's primary group if <code>PrimaryGroup__c</code> is set to <code>true</code>.</p>
<code>Roles</code>	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Nillable, Update</p> <p>Description</p> <p>Role that the individual plays within the household. Valid values:</p> <ul style="list-style-type: none"> • Influencer • Evaluator • Business User • Technical Buyer • Economic Buyer • Other

Field	Details
	<ul style="list-style-type: none"> Decision Maker Economic Decision Maker Executive Sponsor <p> 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.</p>
Rollups__c	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Records associated with the individual that are included in household roll-up summaries. Valid values:</p> <ul style="list-style-type: none"> Tasks Events Financial Accounts Assets and Liabilities Financial Goals
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the individual in an external data source.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the individual's status as a household member took effect.</p>

Alert

Represents notifications to alert advisors about their client accounts.

Supported Calls

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

Fields

Field	Details
Account__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A lookup field to an account that alerts are related to.</p>
Active__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether an alert is active.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The financial account that alerts are related to.</p>
Message__c	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The main content of an alert.</p>
MessageDescription__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description An optional description for the main content of an alert as specified in the <code>Message__c</code> field. This text appears below the main content.</p>

Field	Details
Priority__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description An indication of the urgency of an alert. Valid values:</p> <ul style="list-style-type: none"> • High • Low • Medium
Severity__c	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of alert. Valid values:</p> <ul style="list-style-type: none"> • Error • Info • Warning
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of a record from the external system that triggered the alert.</p>

AssetsAndLiabilities

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	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount of an asset (positive) or liability (negative).</p>
AssetsAndLiabilitiesSource__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Data source. Label is Source. Valid values:</p> <ul style="list-style-type: none"> • Manual Entry • Yodlee
AssetsAndLiabilitiesType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of asset or liability. Label is Type. Valid values:</p> <ul style="list-style-type: none"> • Auto Loan • Mortgage • Other • Personal Loan • Real Estate • Equipment • Automobile • Collection • Gold • Jewelry • Cash
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
Description__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of this asset or liability.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Financial account that this asset or liability is related to.</p>
Household__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Household that this asset or liability is associated with.</p>
JointOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Joint owner, if any, for this asset or liability.</p>
LastReferencedDate	<p>Type date</p> <p>Properties Filter, Nillable, Sort,</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of this asset or liability.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on createFilter, Group, Sort, Update</p> <p>Description ID of the user who created the asset or liability record.</p>
Ownership__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of ownership for this asset or liability. Valid values:</p> <ul style="list-style-type: none"> • Individual • Joint • Trust
OwnerType__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Client's ownership role (primary or joint) for this asset or liability. The value is specified by a trigger.</p>
PrimaryOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Primary owner of this asset or liability.</p>

Field	Details
RecordTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the record type associated with this asset or liability.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the asset or liability in an external data source.</p>

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	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Age. Calculated from <code>Contact.Birthdate</code>.</p>
AgeAsText__c	<p>Type string</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Age expressed in years, months, and days. Calculated from <code>Contact.Birthdate</code>. Label is Age Text.</p>
AnnualIncome__c	<p>Type currency</p>

Field Name	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Annual income.</p>
BillingAddress__c	<p>Type string</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The compound form of the billing address. Based on these address fields: Account.BillingStreet, Account.BillingCity, Account.BillingState, Account.BillingPostalCode, and Account.BillingCountry.</p>
Citizenship__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Citizenship.</p>
CountryOfBirth__c	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Individual's country of birth. Valid values:</p> <ul style="list-style-type: none"> • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda • Argentina • Armenia

Field Name	Details
	<ul style="list-style-type: none">• Aruba• Australia• Austria• Azerbaijan• Bahamas• Bahrain• Bangladesh• Barbados• Belarus• Belgium• Belize• Benin• Bermuda• Bhutan• Bolivia, Plurinational State of• Bonaire, Sint Eustatius and Saba• Bosnia and Herzegovina• Botswana• Bouvet Island• Brazil• British Indian Ocean Territory• Brunei Darussalam• Bulgaria• Burkina Faso• Burundi• Cambodia• Cameroon• Canada• Cape Verde• Cayman Islands• Central African Republic• Chad• Chile• China• Christmas Island• Cocos (Keeling) Islands• Colombia• Comoros

Field Name**Details**

-
- Congo
 - Congo, the Democratic Republic of the
 - Cook Islands
 - Costa Rica
 - Cote d'Ivoire
 - Croatia
 - Cuba
 - Curaçao
 - Cyprus
 - Czech Republic
 - Denmark
 - Djibouti
 - Dominica
 - Dominican Republic
 - Ecuador
 - Egypt
 - El Salvador
 - Equatorial Guinea
 - Eritrea
 - Estonia
 - Ethiopia
 - Falkland Islands (Malvinas)
 - Faroe Islands
 - Fiji
 - Finland
 - France
 - French Guiana
 - French Polynesia
 - French Southern Territories
 - Gabon
 - Gambia
 - Georgia
 - Germany
 - Ghana
 - Gibraltar
 - Greece
 - Greenland
 - Grenada
-

Field Name	Details
	<ul style="list-style-type: none">• Guadeloupe• Guatemala• Guernsey• Guinea• Guinea-Bissau• Guyana• Haiti• Heard Island and McDonald Islands• Holy See (Vatican City State)• Honduras• Hungary• Iceland• India• Indonesia• Iran, Islamic Republic of• Iraq• Ireland• Isle of Man• Israel• Italy• Jamaica• Japan• Jersey• Jordan• Kazakhstan• Kenya• Kiribati• Korea, Democratic People's Republic of• Korea, Republic of• Kuwait• Kyrgyzstan• Lao People's Democratic Republic• Latvia• Lebanon• Lesotho• Liberia• Libyan Arab Jamahiriya• Liechtenstein

Field Name	Details
	<ul style="list-style-type: none">LithuaniaLuxembourgMacaoMacedonia, the former Yugoslav Republic ofMadagascarMalawiMalaysiaMaldivesMaliMaltaMartiniqueMauritaniaMauritiusMayotteMexicoMoldova, Republic ofMonacoMongoliaMontenegroMontserratMoroccoMozambiqueMyanmarNamibiaNauruNepalNetherlandsNew CaledoniaNew ZealandNicaraguaNigerNigeriaNiueNorfolk IslandNorwayOmanPakistanPalestine

Field Name**Details**

-
- Panama
 - Papua New Guinea
 - Paraguay
 - Peru
 - Philippines
 - Pitcairn
 - Poland
 - Portugal
 - Qatar
 - Reunion
 - Romania
 - Russian Federation
 - Rwanda
 - Saint Barthélemy
 - Saint Helena, Ascension and Tristan da Cunha
 - Saint Kitts and Nevis
 - Saint Lucia
 - Saint Martin (French part)
 - Saint Pierre and Miquelon
 - Saint Vincent and the Grenadines
 - Samoa
 - San Marino
 - Sao Tome and Principe
 - Saudi Arabia
 - Senegal
 - Serbia
 - Seychelles
 - Sierra Leone
 - Singapore
 - Sint Maarten (Dutch part)
 - Slovakia
 - Slovenia
 - Solomon Islands
 - Somalia
 - South Africa
 - South Georgia and the South Sandwich Islands
 - South Sudan
 - Spain
-

Field Name	Details
	<ul style="list-style-type: none">• Sri Lanka• Sudan• Suriname• Svalbard and Jan Mayen• Swaziland• Sweden• Switzerland• Syrian Arab Republic• Taiwan• Tajikistan• Tanzania, United Republic of• Thailand• Timor-Leste• Togo• Tokelau• Tonga• Trinidad and Tobago• Tunisia• Turkey• Turkmenistan• Turks and Caicos Islands• Tuvalu• Uganda• Ukraine• United Arab Emirates• United Kingdom• United States• Uruguay• Uzbekistan• Vanuatu• Venezuela, Bolivarian Republic of• Vietnam• Virgin Islands, British• Wallis and Futuna• Western Sahara• Yemen• Zambia• Zimbabwe

Field Name	Details
CountryOfResidence__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Country of primary residence.</p>
CreatedFromLead__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the individual was created from a converted lead (<code>true</code>) or not (<code>false</code>).</p>
CurrentEmployer__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of current employer.</p>
EmployedSince__c	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Tenure with current employer.</p>
Facebook__c	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Facebook profile URL.</p>
Gender__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Gender. Valid values:</p>

Field Name	Details
	<ul style="list-style-type: none"> • Female • Male • Other
IndividualId__c	<p>Type string</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Unique ID that relates this individual's contact record to its account record. Calculated from <code>Account.IndividualId__c</code>.</p>
IndividualType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of individual. Valid values:</p> <ul style="list-style-type: none"> • Individual
LanguagesSpoken__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Languages spoken.</p>
LinkedIn__c	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description LinkedIn profile URL.</p>
MailingAddress__c	<p>Type string</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The compound form of the mailing address. Based on these address fields: <code>MailingStreet</code>, <code>MailingCity</code>, <code>MailingState</code>, <code>MailingPostalCode</code>, and <code>MailingCountry</code>.</p>

Field Name	Details
MaritalStatus__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Marital status. Valid values:</p> <ul style="list-style-type: none"> • Single • Married • Separated • Divorced • Widowed
NumberOfDependents__c	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Number of dependents, such as spouse and dependent children.</p>
Occupation__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Occupation.</p>
OtherAddress__c	<p>Type string</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The compound form of the other address. Based on these address fields: OtherStreet, OtherCity, OtherState, OtherPostalCode, and OtherCountry.</p>
PreferredName__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Individual's preferred name.</p>

Field Name	Details
PrimaryAddressIsBilling__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the billing address is the client's primary address (<code>true</code>) or not (<code>false</code>).</p>
PrimaryAddressIsMailing__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the mailing address is the client's primary address (<code>true</code>) or not (<code>false</code>).</p>
PrimaryAddressIsOther__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the other address is the client's primary address (<code>true</code>) or not (<code>false</code>).</p>
PrimaryAddressIsShipping__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the shipping address is the client's primary address (<code>true</code>) or not (<code>false</code>).</p>
PrimaryLanguage__c	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Individual's primary language. Valid values:</p> <ul style="list-style-type: none"> • Abkhaz • Adyghe • Afrikaans • Akan • Albanian • American Sign Language

Field Name	Details
	<ul style="list-style-type: none">• Amharic• Ancient Greek• Arabic• Aragonese• Aramaic• Armenian• Aymara• Balinese• Basque• Betawi• Bosnian• Breton• Bulgarian• Cantonese• Catalan• Cherokee• Chickasaw• Chinese• Coptic• Cornish• Corsican• Crimean Tatar• Croatian• Czech• Danish• Dawro• Dutch• English• Esperanto• Estonian• Ewe• Fiji Hindi• Filipino• Finnish• French• Galician• Georgian• German

Field Name	Details
	<ul style="list-style-type: none">• Greek, Modern• Greenlandic• Haitian Creole• Hawaiian• Hebrew• Hindi• Hungarian• Icelandic• Indonesian• Interlingua• Inuktitut• Irish• Italian• Japanese• Javanese• Kabardian• Kalasha• Kannada• Kashubian• Khmer• Kinyarwanda• Korean• Kurdish/Kurdi• Ladin• Latgalian• Latin• Lingala• Livonian• Lojban• Low German• Lower Sorbian• Macedonian• Malay• Malayalam• Mandarin• Manx• Maori• Mauritian Creole

Field Name	Details
	<ul style="list-style-type: none">• Middle Low German• Min Nan• Mongolian• Norwegian• Oriya• Pangasinan• Papiamentu• Pashto• Persian• Pitjantjatjara• Polish• Portuguese• Proto-Slavic• Quenya• Rapa Nui• Romanian• Russian• Sanskrit• Scots• Scottish Gaelic• Serbian• Serbo-Croatian• Sinhalese• Slovak• Slovene• Spanish• Swahili• Swedish• Tagalog• Tajik• Tamil• Tarantino• Telugu• Thai• Tok Pisin• Turkish• Twi• Ukrainian

Field Name	Details
	<ul style="list-style-type: none"> • Upper Sorbian • Urdu • Uzbek • Venetian • Vietnamese • Vilamovian • Volapük • Võro • Welsh • Xhosa • Yiddish • Zazaki
SecondaryLanguage__c	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Individual's secondary language. Valid values:</p> <ul style="list-style-type: none"> • Abkhaz • Adyghe • Afrikaans • Akan • Albanian • American Sign Language • Amharic • Ancient Greek • Arabic • Aragonese • Aramaic • Armenian • Aymara • Balinese • Basque • Betawi • Bosnian • Breton • Bulgarian

Field Name	Details
	<ul style="list-style-type: none">• Cantonese• Catalan• Cherokee• Chickasaw• Chinese• Coptic• Cornish• Corsican• Crimean Tatar• Croatian• Czech• Danish• Dawro• Dutch• English• Esperanto• Estonian• Ewe• Fiji Hindi• Filipino• Finnish• French• Galician• Georgian• German• Greek, Modern• Greenlandic• Haitian Creole• Hawaiian• Hebrew• Hindi• Hungarian• Icelandic• Indonesian• Interlingua• Inuktitut• Irish• Italian

Field Name	Details
	<ul style="list-style-type: none">• Japanese• Javanese• Kabardian• Kalasha• Kannada• Kashubian• Khmer• Kinyarwanda• Korean• Kurdish/Kurdi• Ladin• Latgalian• Latin• Lingala• Livonian• Lojban• Low German• Lower Sorbian• Macedonian• Malay• Malayalam• Mandarin• Manx• Maori• Mauritian Creole• Middle Low German• Min Nan• Mongolian• Norwegian• Oriya• Pangasinan• Papiamentu• Pashto• Persian• Pitjantjatjara• Polish• Portuguese• Proto-Slavic

Field Name**Details**

-
- Quenya
 - Rapa Nui
 - Romanian
 - Russian
 - Sanskrit
 - Scots
 - Scottish Gaelic
 - Serbian
 - Serbo-Croatian
 - Sinhalese
 - Slovak
 - Slovene
 - Spanish
 - Swahili
 - Swedish
 - Tagalog
 - Tajik
 - Tamil
 - Tarantino
 - Telugu
 - Thai
 - Tok Pisin
 - Turkish
 - Twi
 - Ukrainian
 - Upper Sorbian
 - Urdu
 - Uzbek
 - Venetian
 - Vietnamese
 - Vilamovian
 - Volapük
 - Võro
 - Welsh
 - Xhosa
 - Yiddish
 - Zazaki
-

Field Name	Details
ShippingAddress__c	<p>Type string</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The compound form of the shipping address. Based on these address fields: Account.ShippingStreet, Account.ShippingCity, Account.ShippingState, Account.ShippingPostalCode, and Account.ShippingCountry.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the individual in an external data source.</p>
TaxBracket__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Rate at which the individual is taxed. Valid values:</p> <ul style="list-style-type: none"> • 10% • 15% • 25% • 28% • 33% • 35%
TaxId__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Tax Identification Number or Social Security Number.</p>
Twitter__c	<p>Type url</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	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 (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> .
Contact__c	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Contact that <code>RelatedContact__c</code> is related from.
CurrencyIsoCode	Type picklist

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
EndDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the relationship ended.</p>
ExternalId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the relationship in an external data source.</p>
InverseRelationship__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Uniquely identifies the relationship between Contact and RelatedContact__c so that it can be referenced by a trigger that creates the inverse relationship record.</p>
Name	<p>Type string</p> <p>Properties Defaulted on create, Filter, idLookup, Sort</p> <p>Description Auto-number identifier for the relationship. Label is Contact Relation Name.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the relationship record.</p>

Field	Details
RelatedContact__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Contact that Contact__c is related to.</p>
Role__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Role that describes how RelatedContact__c is related to Contact__c</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the relationship in an external data source.</p>
StartDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the relationship started.</p>

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	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p>Description Client expectations that this event relates to.</p>
Household__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the household associated with the client.</p>
NextSteps__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Next steps for this client event.</p>
Objectives__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Client objectives that this event relates to.</p>
Regarding__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The nature of this client event. Valid values:</p> <ul style="list-style-type: none"> • 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	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Street address line 1 for mailing address.</p>
Address2__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Street address line 2 for mailing address.</p>
ApplicationDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the client submitted the financial account application.</p>
AssetRebalance__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Sort, Update</p> <p>Description Indicates whether automatic portfolio rebalancing applies to this financial account (<code>true</code>) or not (<code>false</code>).</p>
AverageBalance__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Average amount of money in the financial account, over a time period.</p>

Field	Details
Balance__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Amount of money in the financial account.</p>
CashBalance__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Cash available in the financial account.</p>
City__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description City for mailing address.</p>
CloseDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when this financial account was closed.</p>
Country__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Country for mailing address.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>

Field	Details
Description__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description of the financial account.</p>
Discretionary__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the advisor has discretionary trading authority for this financial account (<code>true</code>) or not (<code>false</code>).</p>
FinancialAccountNumber__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the financial account in an external data source. Label is <code>Account Number</code>.</p>
FinancialAccountSource__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Data source. Label is <code>Source</code>. Valid values:</p> <ul style="list-style-type: none"> • Integrator • Manual Entry • Pending
FinancialAccountType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of financial account. Label is <code>Type</code>. Valid values:</p> <ul style="list-style-type: none"> • 401(a) • 401(k)

Field	Details
	<ul style="list-style-type: none"> • 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	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this financial account is managed or administered externally (<code>true</code>) or in-house (<code>false</code>).</p>
HoldingCount__c	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Number of holdings within this financial account. Calculated by roll-up summary. Label is <code>Number of Holdings</code>.</p>
Household__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Household that this financial account rolls up to.</p>
InsuredAmount__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The insured value that an insurance policy covers.</p>
InvestmentObjectives__c	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Purpose of this financial account. Valid values:</p> <ul style="list-style-type: none"> • Safety • Income • Growth • Tax Optimization • Liquidity
JointOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Joint owner of this financial account.</p>
LastActivityDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Timestamp for when this financial account last had a task or event action associated with the record.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastUpdated__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Timestamp for when data for this financial account was last updated by an external data source.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record.</p>
Managed__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this financial account is managed or administered by our firm (<code>true</code>) or not (<code>false</code>).</p>
MinimumBalance__c	<p>Type currency</p> <p>Properties Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p>Description Minimum balance requirement for this financial account.</p>
ModelPortfolio__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Model asset allocation for this financial account. Valid values:</p> <ul style="list-style-type: none"> • Conservative • Moderate

Field	Details
	<ul style="list-style-type: none"> Balanced Growth Aggressive
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of this financial account.</p>
OpenDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when this financial account was opened.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the financial account record.</p>
Ownership__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of ownership for this financial account. Valid values:</p> <ul style="list-style-type: none"> Individual Joint Trust
OwnerType__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Client's ownership role (primary or joint) for this financial account.</p>

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

Field	Details
	<p>Description Performance measured over the past calendar year-to-date.</p>
PostalCode__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Postal code for mailing address.</p>
Premium__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount paid to the insurer for insurance policy coverage.</p>
PrimaryOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Primary owner of this financial account.</p>
RebalanceFrequency__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Frequency of portfolio rebalancing for this financial account. Valid values:</p> <ul style="list-style-type: none"> • Monthly • Quarterly • Semiannually • Annually
RecordTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the record type associated with this financial account.</p>

Field	Details
RecordTypeName__c	<p>Type string</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Record type for this financial account. The value is copied from <code>RecordType.Name</code> and can't be changed. Label is <code>Record Type</code>.</p>
RenewalDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when insurance policy renewal is due.</p>
ServiceProvider__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Custodian or recordkeeper of this financial account.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the financial account in an external data source.</p>
State__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description State for mailing address.</p>
Status__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Status of this financial account. Valid values:</p> <ul style="list-style-type: none"> • Open • Closed • On Hold • Pending
TaxID__c	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Tax Identification Number associated with this financial account.</p>
TaxStatus__c	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Type of tax treatment this financial account qualifies for. Valid values:</p> <ul style="list-style-type: none"> • Nonqualified • Qualified
TimeHorizon__c	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Investment time frame for this financial account. Valid values:</p> <ul style="list-style-type: none"> • 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	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the organizational entity or person currently occupies this role (<code>true</code>) or not (<code>false</code>).</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
Editable__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this field is editable (<code>true</code>) or not (<code>false</code>).</p>
EndDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description End date when the organizational entity or person relinquished this role.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Financial account that this role is related to.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the financial account role.</p>
RecordTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the record type associated with this financial account role.</p>
RelatedAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the organizational entity that is involved with the financial account.</p>
RelatedContact__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the person who is involved with the financial account.</p>
Role__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>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:</p> <ul style="list-style-type: none"> • Corporation • Foundation <p>When the record type is set to Contact Role:</p> <ul style="list-style-type: none"> • Trustee • Beneficiary

Field	Details
	<ul style="list-style-type: none"> • Grantor • Accountant • Business Manager
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the role in an external data source.</p>
StartDate__c	<p>Type date</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description Start date when the organizational entity or person assumed this role. The default value is the current date.</p>

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	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Current amount saved toward goal.</p>
CompletionDate__c	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the goal was reached.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
Description__c	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Description of the goal.</p>
Household__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Household that this goal is associated with.</p>
InitialValue__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Starting amount saved toward goal.</p>
LastActivityDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Timestamp for when this goal last had a task or event action associated with the record.</p>
LastReferencedDate	<p>Type date</p>

Field	Details
	<p>Properties Filter, Nillable, Sort,</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of this goal.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the financial goal record.</p>
PrimaryOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Primary owner of this goal.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the goal in an external data source.</p>
Status__c	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of goal. Valid values:</p> <ul style="list-style-type: none"> • Completed • In Progress • Not Started
TargetDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the goal is expected to be reached.</p>
TargetValue__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Amount required for the goal.</p>
Type__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Purpose of goal. Valid values:</p> <ul style="list-style-type: none"> • 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
<code>AssetCategory__c</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Subcategory of asset type. Valid values:</p> <ul style="list-style-type: none"> • U.S. Equity • Sector Equity • Allocation • International Equity • Alternative • Commodities • Taxable Bond • Municipal Bond
<code>AssetCategoryName__c</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Market capitalization and investing style. Valid values:</p> <ul style="list-style-type: none"> • Large Growth • Large Value • Large Blend • Small Growth • Small Value • Small Blend • Mid-Cap Growth • Mid-Cap Value • Mid-Cap Blend
<code>AssetClass__c</code>	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Major category of asset type. Valid values:</p> <ul style="list-style-type: none"> • Equities • Fixed Income • Cash Equivalents • Alternative Investments
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Financial account that this holding is related to.</p>
GainLoss__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Change in value since purchase.</p>
Household__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Household that this holding rolls up to.</p>
LastActivityDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description Timestamp for when this financial holding last had a task or event action associated with the record.</p>
LastReferencedDate	<p>Type date</p> <p>Properties Filter, Nillable, Sort,</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastUpdated__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Timestamp for when data for this holding was last updated by an external data source.</p>
LastViewedDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Timestamp for when the current user last viewed this record.</p>
MarketValue__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Current market value.</p>
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of this holding.</p>
PercentChange__c	<p>Type percent</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Percent change in value since purchase.</p>
Price__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Current price per share.</p>
PrimaryOwner__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Primary owner of this holding.</p>
PurchasePrice__c	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Price per-share at time of purchase.</p>
Securities__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the securities held. Label is <code>Symbol</code>.</p>
Shares__c	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Number of shares held.</p>
SourceSystemId__c	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the holding in an external data source.</p>
Symbol__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Ticker symbol for the securities held. The value is copied from <code>Securities__c</code> and can't be changed.</p>

Lead Custom Fields

Represents a lead associated with a client. Custom fields extend the Lead object for use in Financial Services Cloud.

Fields

Field Name	Details
CreatedFromLead__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether a contact converted from this lead sets the value of <code>Contact.CreatedFromLead__c</code> as (<code>true</code>) or not (<code>false</code>).</p>
Employer__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The lead's employer information that converts to the client's contact record upon lead conversion.</p>

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	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Client that the life event is related to.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
DiscussionNote__c	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Notes from client discussions.</p>
EventDate__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date of the life event.</p>
EventType__c	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of life event. Valid values:</p> <ul style="list-style-type: none"> • College • New Baby • New Business • New Home • New Job • Retirement
FinancialGoal__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Financial goal that the life event is related to.</p>
GoalType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of financial goal implied by the life event. Valid values:</p> <ul style="list-style-type: none"> • Saving for College • Saving for Retirement
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the goal in an external data source.</p>

Opportunity Custom Fields

Represents an opportunity associated with a client. Custom fields extend the Opportunity object for use in Financial Services Cloud.

Fields

Field Name	Details
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates whether the billing address is the client's primary address (<code>true</code>) or not (<code>false</code>).</p>

ReciprocalRole

Represents the other entity's corresponding role in a one-to-one relationship between entities.

Supported Calls

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

Fields

Field	Details
CreateInverseRole__c	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the corresponding reciprocal role record is created automatically for the inverse role (<code>true</code>) or not (<code>false</code>).</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
InverseRelationship__c	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Uniquely identifies the relationship between Role and InverseRole__c so that it can be referenced by a trigger that creates the inverse relationship record.</p>
InverseRole__c	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>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.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of this reciprocal role.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the reciprocal role record.</p>

Field	Details
RecordTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the record type associated with this reciprocal role.</p>
RelationshipType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Type of entities involved in the relationship. Valid values:</p> <ul style="list-style-type: none"> • All • Contact Contact Relation • Account Account Relation
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description ID that uniquely identifies the reciprocal role in an external data source.</p>

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
CurrencyIsoCode	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description If multiple currencies is enabled, contains the currency ISO code associated with the record.</p>
CUSIP__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Committee on Uniform Securities Identification Procedures identification number for the securities.</p>
Exchange__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Exchange on which the securities are traded. Valid values:</p> <ul style="list-style-type: none"> • NYSE • NASDAQ
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LastUpdated__c	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Timestamp for when data for the securities was last updated by an external data source.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description Timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Name of the securities. Label is <code>Symbol</code>.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the securities record.</p>
Price__c	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Current price of the securities.</p>
SecuritiesName__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name that uniquely identifies the securities.</p>
SecurityId__c	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the securities.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>ID that uniquely identifies the securities in an external data source.</p>

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	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Client expectations that this task relates to.</p>
Household__c	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>ID of the household associated with the client.</p>
NextSteps__c	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Next steps for this client task.</p>
Objectives__c	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Client objectives that this task relates to.</p>

Field Name	Details
Regarding__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The nature of this client task. Valid values:</p> <ul style="list-style-type: none"> • Prospecting • Onboarding • Client Retention • Service

Revenue

Represents data from Financial Services Cloud and external systems to aggregate revenue streams for an advisor's book of business.

Supported Calls

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

Fields

Field	Details
Account__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Account that Revenue__c is related from. This field or FinancialAccount__c requires an entry but not both.</p>
Amount__c	<p>Type currency</p> <p>Properties Create, Filter Sort, Update</p> <p>Description Revenue amount.</p>

Field	Details
Date__c	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Date when this revenue was made.</p>
FinancialAccount__c	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Financial Account that Revenue__c is related from. This field or Account__c requires an entry but not both.</p>
SourceSystemId__c	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description A value that uniquely identifies the revenue in an external data source.</p>
SubType__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The subtype of revenues. Valid values: Transaction, Advisory, Investment, Custodian, Planning.</p>
Type__c	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of revenues. Valid values: Fees, Commission.</p>

FINANCIAL SERVICES CLOUD CUSTOM METADATA TYPES

Financial Services Cloud Custom Metadata Types

Use custom metadata types and fields that help deliver additional features for Financial Services Cloud.

Fields and custom metadata types in the package have the `FinServ` namespace prefix. For example,

`FinServ__AccountRecordType__c` is a custom field on Individual Record Type Mapper.

`FinServ__IndividualRecordTypeMapper__mdt` is a custom metadata type.


Not all fields are listed for some custom metadata types. To verify the complete list of fields for a custom metadata type, use a describe call from the API, inspect the WSDL, or use a schema viewer.

SEE ALSO:

[Custom Metadata Types](#)

IndividualRecordTypeMapper


Maps a new custom Individual record type to the standard Individual record type from Financial Services Cloud.

 **Note:** New custom fields can't be added to managed custom metadata types.

Supported Calls

`describeLayout()`, `describeSObjects()`, `query()`, `retrieve()`, `search()`

Field	Details
<code>AccountRecordTypeNamespace__c</code>	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Namespace for Account record type being mapped.</p>
<code>AccountRecordType__c</code>	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of your new custom Individual record type being mapped to the Financial Services Cloud Individual record type.</p>

Field	Details
	 Note: This field is for Salesforce internal-use only. By default, this field doesn't appear on any page layout.
ContactRecordTypeNamespace__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Namespace for Contact record type being mapped.</p>
ContactRecordType__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Contact record type being mapped to the Financial Services Cloud Individual record type.</p>
DetailPage__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Salesforce internal-use only.</p>
IndividualType__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Type of Individual being mapped.</p>
LeadRecordTypeNamespace__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Lead namespace for your custom record type's org.</p>
LeadRecordType__c	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>Lead Record Type to be used when converting Lead records. Leave this field blank to use any record type. All available record types are converted to an Individual record type unless there is another mapping specified.</p>


GroupRecordTypeMapper

Maps a new custom Group record type to the standard Group record type from Financial Services Cloud.

 **Note:** New custom fields can't be added to managed custom metadata types.

Supported Calls

`describeLayout()`, `describeSObjects()`, `query()`, `retrieve()`, `search()`

Field	Details
<code>AccountRecordType__c</code>	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The name of your new custom Group record type being mapped to the Financial Services Cloud Group record type.</p> <p> Note: This field is for Salesforce internal-use only. By default, this field doesn't appear on any page layout.</p>
<code>AccountRecordTypeNamespace__c</code>	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>Namespace for Account record type being mapped.</p>

FINANCIAL SERVICES CLOUD CUSTOM TRIGGERS

Financial Services Cloud Custom Triggers

Custom triggers ensure that data flows properly through the custom-designed objects and fields for Financial Services Cloud.

Custom triggers that are provided for you, and use the `FinServ` namespace prefix. For example, `FinServ__AccountTrigger` is a custom trigger on `Account` that performs tasks on `Account`, `Contact`, and the relationship object `AccountAccountRelation`.

Table 1: Financial Services Cloud Quick Reference for Triggers

Host Object	Trigger Name
AccountAccountRelation	FinServ__AccountAccountRelationTrigger
AccountContactRelation	FinServ__AccountContactRelationTrigger
Account	FinServ__AccountTrigger
AssetsAndLiabilities	FinServ__AssetsAndLiabilitiesTrigger
ContactcontactRelation	FinServ__ContactContactRelationTrigger
Contact	FinServ__ContactTrigger
Event	FinServ__EventTrigger
FinancialAccountRole	FinServ__FinancialAccountRoleTrigger
FinancialAccount	FinServ__FinancialAccountTrigger
FinancialGoal	FinServ__FinancialGoalTrigger
FinancialHolding	FinServ__FinancialHoldingTrigger
Lead	FinServ__LeadTrigger
ReciprocalRole	FinServ__ReciprocalRoleTrigger
RollupByLookupConfig	FinServ__RollupByLookupConfigTrigger
Task	FinServ__TaskTrigger

Trigger Behavior

The package provides triggers on `SObjects`, `Relation SObjects`, and `Rollup SObjects`. Each object type's trigger checks for various conditions and then performs tasks based on what it finds. Each object has only one trigger, the following list explains trigger behavior by object.

SObjects

Account

Before insert: Checks the record type to see if the account is a portion of an individual. If it isn't, the `IndividualType` field is set to blank.

After insert: Creates an individual contact linked to the account if the user creates an account of record type Individual. Also assigns topics based on the value in the field after a new account has been created.

Steps to create an individual contact and assign topics:

- For each account created, create a contact.
- For each contact, associate the `AccountId`.
- For each account, associate the `ContactId`. This is done in a **future** method.
- If automatic household creation is set, `HouseholdService` is called to create a household.
- Set `IndividualId__c` to the `AccountId`, and set to the current date.

Before update: Validates that the update on the account:

- Doesn't change the account's record type from individual to another record type, and doesn't change from one individual record type to another.
- Doesn't change the account's record type from another record type to an individual record type.

After update: Updates the `Account Name` when the `Contact Name` for that client is updated. Also assigns topics based on the values in the field after a new account has been created.

Before delete: Helps perform cascade deletes. Gathers all rollup objects related to the account to be deleted.

After delete: Rolls back the rollup objects related to the deleted account.

Contact

Before insert: Creates an individual (Account - Representing Party) when the individual contact is promoted as an individual.

- For each account that is passed, create a contact entity.
- For each contact, associate the `AccountId`.
- For each account, associate the `ContactId`. This is done in a **future** method.
- If automatic household creation is set, `HouseholdService` is called to create a household.
- Set `IndividualId__c` to the `AccountId`, and set the current datetime.

After insert: Validates that the referenced individual account does not already have a contact associated with it. This check is bypassed during a lead conversion.

Before update: Validates that the update on the account record:

- Doesn't change the record type of the account from individual to another record type.
- Doesn't change the record type of the account from any other record type to an individual.
- Validates that the referenced individual account does not already have a contact associated with it.

After update: Syncs the account associated with the updated contact to reflect the updated fields. The following fields are synced:

- `AccountName`
- `OwnerId`
- `IndividualType__c`
- `RecordTypeId`

 **Note:** Revenue and Securities SObjects don't have triggers.

Relation SObjects

AccountContactRelation (ACR)

Before insert: Populates the `RecordTypeId` and the `Date` for each ACR record to be inserted. Ensures that each ACR obeys the following requirements:

- No multiple primary members for a given household
- Contact portion can't be a member of multiple households
- No multiple ACR records with the same `AccountId` and `ContactId` combination

After insert: Recalculates the rollups for all groups in which member or business ACRs are changed.

Before update: Performs the same actions as before the insert.

After update: Performs the same actions as after the insert.

Before delete: Ensures that none of the ACRs to be deleted are of the record type `Group`. Also recalculates rollups for all groups when any member or business ACRs are changed.

AccountAccountRelation (AAR)

After insert: Creates the inverse record if the auto-create inverse setting is selected.

Before update: Checks to see if records are being deactivated. If so, sets `EndDate__c` as the day of the update, and deactivates the inverse record if the auto-create inverse setting is selected.

Before delete: Deletes the inverse record of the AAR if the auto-create inverse setting is selected.


ContactContactRelation (CCR)

After insert: Creates the inverse record if the auto-create inverse setting is selected.

Before update: Checks to see if records are being deactivated. If so, sets the `EndDate__c` as today, and deactivates the inverse record if the auto-create inverse setting is selected.

Before delete: Deletes the inverse record of the CCR if the auto-create inverse setting is selected.

Rollup SObjects

 **Note:** Rollup SObject triggers generally revolve around updating the `Household__c` field, which points to the account portion of the group that they roll up to. In most cases, the rollup calculation is also calculated.

Financial Account

Before insert: Sets the value of the owner type when an existing `FinancialAccount` record is updated, then sets the `Household__c` field to the account portion of the group that it's rolling up to.

After insert: At a minimum, creates the primary owner role for a new financial account, along with joint owner roles and user-selected roles if any. Also, performs a rollup calculation.

Before update: Sets the value of the owner type when a financial account is updated, then sets the `Household__c` field to the account portion of the group that it's rolling up to.

After update:

- Creates a primary owner role for a new financial account.
- Creates joint owner roles and user-selected roles if any.
- Performs rollup calculation.

After delete: Performs rollup calculation.

Assets and Liabilities

Before insert: Sets the value of the owner type when a financial account is updated, then sets the `Household__c` field to the account portion of the group that it's rolling up to.

Before update: Sets the value of the owner type when a financial account is updated, then sets the `Household__c` field to the account portion of the group that the financial account is rolling up to.

Financial Goals

Before insert: Sets the `Household__c` field of the FinancialGoal record to the account portion of the group that the financial goal is rolling up to.

After insert: No validation or action.

Before update: Sets the `Household__c` field of the financial goal to the account portion of the group that the financial goal is rolling up to.

Financial Account Role (FAR)

Before insert: Checks the `RelatedContact__c` field of the FAR record to see if it's associated with an individual account. Updates the `RelatedAccount__c` field to that of the individual account if it is.

Before update:

- Checks the `RelatedContact__c` field of the FAR record to see if it's associated with an individual account. Updates the `RelatedAccount__c` field if it is.
- Sets the end day to the day of the update on the FARs that were deactivated.

Financial Holdings

Before insert: Retrieves financial account fields based on the FinancialHolding record and then populates the `Household__c` and `PrimaryOwner` fields on the financial holding to be inserted.



Note: Financial holdings are not part of the rollup objects, so no rollup is performed.