

TARGETED SUPPORT

Strategic Briefing

A board-level briefing for firms designing Targeted Support operating models that are client-centred, evidence-led, and safely executable — without crossing into advice.

What the briefing covers

- Where your firm sits on the advice-support spectrum
- Key boundary risks and behavioural failure modes
- Governance, controls, and evidence expectations
- A pragmatic execution path: govern → pilot → evidence → scale

Who this briefing is for

- Boards and executive teams
- Compliance, risk, and proposition leads
- Advice firms, networks, platforms, and employee benefit firms

What you leave with

- A clear Targeted Support operating model outline
- An evidence and outcomes measurement framework
- A practical implementation playbook your teams can execute
- Defined next steps for Board, Compliance, and Operations

NEXT STEP

Request a briefing by emailing info@sustain-momentum.com

Briefings are typically 30–45 minutes and focused on clarity, not selling.

Targeted Support is an educational and implementation framework. Firms remain responsible for their own regulatory interpretation and decisions.