

TARGETED SUPPORT

# Strategic Briefing

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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](mailto:info@sustain-momentum.com)**  
**Briefings are typically 30–45 minutes and focused on clarity, not selling.**

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