



# How-To Guide for In-District **ADVOCACY ACTIVITIES**

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## Step 1

# Who Represents You?

Find your legislators' Capitol and In-District contact information.

- Use [this tool](#) to enter your home address to find your State and Federal legislators.

## Step 2 (Optional)

# Coordinate With Your FPA Chapter.

There may be other FPA Members represented by the same legislators who you could team up with for the meeting. Try to keep groups to five or fewer individuals.

## Step 3

# Set-Up A Meeting.

Identify the appropriate method for requesting a meeting with your legislator or their staff. You'll typically complete an online meeting request on their website or reach out to the in-district scheduler via email or by phone to get an in-person meeting on the legislator's calendar. Questions to consider:

- Do they have an online form to fill out for meeting requests?
- Is their in-district scheduler's email available online?
- Do you need to call the district office to get the scheduler's contact information?
- You can use the resource link in "Step 1" to get the general contact information for the district office nearest you.



## Step 4

# Prepare Your Information.

Prepare the information you need to request a meeting. Whether you are submitting a form, or sending an email, there is key information\* that you must include when contacting your member's office. You should provide:

- Your full name (and those of others joining you).
- Where you live in the district or state.
- A brief description of the issue that you wish to discuss. If there is a specific bill that you would like to address, include the name or number of that piece of legislation.
- The date range in which you'd like the meeting to occur.

Make your request stronger by including this information if you are able:

- A brief description of the roles you and your group play in your community. Are you involved in any pro bono or community services activities related to financial planning?
- Briefly describe the Financial Planning Association and basic information about your Chapter.
- If you or your group has met with the member or their staff before (in-district or at the Capitol), reference who you met with most recently and when.

\*Sourced from the [Friends Committee on National Legislation](#).

## Step 5

# Identify Your Meeting Date Range.

Identify the date range in which you'd like to meet with your legislator and prepare to submit your meeting request approximately four weeks (Fig. 1 on the next page) before your desired meeting date(s). Ideally, these would be scheduled in a time frame when your legislature is in recess (i.e., on break) because you'll have the greatest likelihood of meeting directly with your legislator rather than staff. However, meeting with key staff is JUST AS IMPORTANT as meeting with the legislators themselves, so be open to that if it's your only opportunity for a meeting!





Figure 2. Example image of state legislative sessions that were in session” or adjourned (i.e., on recess) according to the National Conference of State Legislatures as of July 25, 2024. You can click on your state, and a pop-up will show you more detailed information about session dates.

You may want to confirm by visiting your state legislature’s website—the calendars can be tricky to find, but a “Google” search of “[insert state] 2024 legislative session calendar” should get you pointed in the right direction. You can also call your legislators’ Capitol or district offices to confirm!

## Step 6

# Utilize Template Communications.

Reference the template phone and written scripts, below, for scheduling your meeting.

### **If you need to call the District Office to get the scheduler’s contact information:**

“Hi, my name is \_\_\_\_\_ and I’m calling on behalf of a group of constituents from the Financial Planning Association of [insert state] to schedule a meeting with Representative/Senator [insert legislator’s name] in the coming weeks. Would you be able to share the Representative’s/Senator’s scheduler’s contact information?”

### **If you have the scheduler’s contact information and are ready to send an email OR if you’re using an online form for scheduling:**

Introduction: “Hi, my is \_\_\_\_\_ and I’m writing on behalf of a group of constituents from the Financial Planning Association of [insert state] to schedule an in-person meeting with Representative/Senator [insert legislator’s name] sometime between [insert date] and [insert date].

Who you are (tailored for an individual or group): We are practicing financial planners from the [insert Chapter name] and are all constituents of Representative/Senator [insert legislator’s name] from [list of the cities/neighborhoods (if that’s a typical descriptor in your city) where each member lives]. The Financial Planning Association® is the leading membership organization and trade association for CERTIFIED FINANCIAL PLANNER™ professionals and those engaged in the financial planning process.

What you want to talk about: We’d like to discuss with the Representative/Senator FPA’s public policy priorities, which include ensuring financial literacy education for high school students prior to graduation and increasing access to financial planning services by implementing tax benefits for low-to-moderate income households who utilize financial planning services.

- *Note if there was a specific bill you supported in the previous session that you want to see reintroduced and supported in the upcoming session. Here’s an example: FPA was particularly supportive of H.B. XXXX in this past legislative session, which would have required high school students to pass a stand-alone ½ credit course in financial literacy education to graduate.*

Conclusion: We look forward to sharing more about our policy goals, what our Chapter is doing to serve our community, and learning about your priorities for the next legislative session. We believe that financial planning and financial literacy are vital to the wellbeing of our community and look forward to any opportunities to collaborate locally or at the Capitol.

Please feel free to reach out to me at [insert phone number] at any time!

All my best,

[Signature]

- *Note: Attach the About FPA Fact Sheet to this email or in the online form, if possible.*

## Step 7

# Prepare For Success.

After the meeting is scheduled, follow these steps to prepare for a successful meeting.

- Do your research on your legislator! Check out your legislator on their website, social media pages, and regular media appearances. Are there any issues they're passionate about that intersect with financial planning that you can use in your talking points? Even the most innocuous-seeming details (like what type of dog they have or where they went to college) are opportunities for you and your group to find ways to connect and be memorable.
- Prepare your agenda. Ensure that each person in the group knows their role in the meeting and the talking points for each issue. See Fig. 3.



## Fig. 3 Example Meeting Agenda

All do quick introductions (with Person 1 going last).

### Person 1—Introductions:

- Introduce yourself
- Financial Planning Association (remember, no acronyms!), and
- Why you're here advocating for financial planners and the role financial planning plays in peoples' lives.
  - Point out the "FPA In The Community" fact sheet and discuss your chapter (or the organization's if you're not from the same state as the legislator) pro bono and financial literacy workshop services!

### Person 2—FPA SUPPORTS S. 722:

- To expand the qualified expenses for 529 spending accounts to include secondary certifications and credentials.
  - *Supporting materials: Reference the HR 1477/S. 722 fact sheet in their folders.*
  - *Ask: Will the Member co-sponsor S. 722?*

### Person 3—FPA SUPPORTS S. 1481:

- To protect vulnerable adults from financial exploitation.
  - *Supporting materials: Reference the Letter of Support in their folders.*
  - *Ask: Will the Member co-sponsor S. 1481?*

### Person 4—WRAP UP:

- Thank the Member for their time and ask if they have any questions.
  - *Remind the Member/staffer that there are opportunities to collaborate with local FPA chapters on pro bono services or financial literacy workshops.*

### Person 5:

- Take notes and ask for a photo if the Member is present.

Figure 3. Example agenda from a DC Advocacy Day where members discussed multiple pieces of federal legislation.



- Understand your talking points/issues.
  - Take some time to review relevant legislation from previous sessions to see if/how your legislator voted and if your legislator sits on an important committee for financial planning-related policy advocacy (include in your search any awareness-building resolutions such as those declaring April as Financial Literacy Awareness Month or October as Financial Planning Month),
  - Review FPA Fact sheets and position statements on policies.
  - Collaborate with your group to decide what numbers or stories you're going to share about your Chapter's pro bono work.

## Step 8

# Send A Confirmation.

The week of the meeting, send the scheduler an email confirming date, time, location of meeting, and list of attendees.

## Step 9

# Get Your Materials Together.

Print all the fact sheets, agendas, and talking points you want to take to the meetings. Remember to bring business cards!

- About FPA Fact Sheet
- FPA Financial Literacy Fact Sheet
- FPA Tax Issues Fact Sheet
- FPA Community Impact Fact Sheet

After the Meeting: Follow up with the staffer who also attended the meeting (if any), thanking them for their time and:

- Answering any questions that may have come up during the meeting,
- Sending PDF versions of the fact sheets,
- Asking if there are any local events that FPA Members could attend,
- Reminding the staff and legislator that FPA would be interested in co-hosting a pro bono event, such as a financial literacy workshop, for their constituents.

### Additional Resources

- Face-to-Face with Congress: Before, During, and After Meetings with Legislators. [Available here.](#)
- Tips for Crafting an Elevator Speech. [Available here.](#)





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For any advocacy support or information,  
please email [advocacy@onefpa.org](mailto:advocacy@onefpa.org).