

HILL MEETINGS: HELPFUL HINTS

Nothing matters more to an elected federal official than hearing a message directly from their constituent, and this is your chance to make a personal connection to Members and staff. Most staff do not have as much expertise on our industry as you do—you possess a unique perspective on how people save for their future. Here are a few helpful tips on meeting with your Member of Congress or Senator:

- Allow extra time to get to your meeting and be prepared for meetings to run late (or start late). Even if a member of your group is not with you, start the meeting on time. Designate one member of your group as the point of contact to call your office contact at the pick-up location.
- Go over your talking points ahead of time, think about how you will convey information in a conversational way. If there are multiple delegates in your meeting, coordinate in advance who will be addressing each talking point.
- Travel as lightly as possible. Offices have metal detectors, and lines can get long. To get through security as quickly as you can, don't bring liquids, cosmetics, or sharp objects to your meeting.
- If you meet with a member of Congress, refer to them as "Senator" or "Congressman/woman." Try not to be put off if the member of Congress misses the meeting and you meet with staff.
- Start the meeting by talking about yourself and your practice. Describe the amount and types of businesses you work with within the state. List the number of participants covered by plans you work with.
- Avoid the "chit-chat trap" ...members of Congress or staff may try to make small talk for the whole meeting. Make sure you are prepared, after appropriate greetings and small talk, to bring the meeting to its purpose.
- Offer to be a resource. Leave your business card with the handout you will leave behind.
- Thank them for their time and efforts. Please send a thank you note to your member of Congress (or staff with which you met) thanking them for the visit. We provide a template for you.