



ARA's Capitol Hill Advocacy Toolkit

A step-by-step guide to effective retirement policy advocacy

WHY YOUR VOICE MATTERS

Every day, legislators make decisions that affect retirement security for millions of Americans. **Your expertise and perspective are crucial** to helping them understand the real-world impact of their policy choices.

When advocates like you don't speak up, Congress may make decisions without fully understanding how they'll affect the communities you serve.

QUICK START: 3 ACTIONS YOU CAN TAKE TODAY

- 1. Research Your Legislators**
 - Find your Representative [here](#). Don't forget your two Senators!
 - Look up their committee assignments and positions on retirement issues
 - Check their websites for priority issues
 - Sign up for their newsletters and subscribe to their X (Twitter) accounts
- 2. Make Contact (For the NAPA Fly-In Forum, ARA Staff Have This Covered)**
 - Send an introductory email about yourself and your company
 - Request a meeting (virtual or in-person)
 - Introduce yourself as a local constituent and retirement expert
- 3. Get Informed**
 - Review [ARA's talking points](#)
 - Join a [Government Affairs Committee](#)
 - Stay current on key retirement legislation

KNOW YOUR LEGISLATOR: RESEARCH CHECKLIST

Before reaching out, gather this information:

Personal & Political Background

- Personal history (shared connections, background)
- Election status (up for reelection? primary challenges?)
- Political ideology (moderate vs. partisan)
- Leadership roles in their party

Policy Interests

- Committee assignments (see "Key Congressional Committees" below)
- Listed priorities on their website
- Past retirement-related bills they've supported
- Recent statements on financial security/retirement



Where to Research

- Official websites and social media
- Congress.gov (bill sponsorships)
- Press releases
- NAPA-net/ASPPA-net archives
- Local news coverage

PREPARING FOR YOUR MEETING

Know Your Objective

Before scheduling, be clear on:

- What you want to accomplish
- Your specific “ask” (e.g., “Please cosponsor H.R. X”)
- The personal story you’ll share
- Key data points about local impact

Meeting Prep Checklist

- Research the legislator (see checklist above)
- Prepare 1-2 page leave-behind materials
- Practice your 10-minute pitch
- Assign roles if bringing a team
- Plan for security/parking (if visiting DC)

What to Bring

- Business cards
- One-page summary of your company/organization
- Fact sheets on your key issue
- Specific legislative “ask”
- Camera for photos (ask permission first)

MEETING DAY: BEST PRACTICES

Opening (2-3 minutes)

- “Good morning, Congressman/Congresswoman [Name]”
- Introduce yourself: name, title, where you live/work
- Share your constituency: “I serve X companies with Y employees”
- State your purpose: “I’m here to discuss [specific issue]”

Your Message (5-7 minutes)

- Lead with your personal story
- Share local impact data
- Make your specific ask clear
- Use simple language (avoid jargon like “plan participants”)





Closing (1-2 minutes)

- Thank them for their time
- Ask: "What questions do you have?"
- Offer to be a resource: "How can I help you on retirement issues?"
- Request a photo if appropriate

Pro Tips

DO:

- Keep the tone positive and collaborative
- Listen to their concerns
- Take notes on their questions
- Leave time for discussion

AVOID:

- Monopolizing the conversation
- Using technical jargon
- Bringing up unrelated issues
- Being confrontational

WORKING WITH STAFF

Why Staff Matters

Legislative staff are your key partners. They:

- Research issues and brief the legislator
- Often have specialized expertise
- Influence voting decisions
- Are more accessible than the legislator

Key Staff to Know

- Legislative Assistant (Tax/Retirement) - Primary contact for retirement issues
- Committee Staff - If your legislator serves on relevant committees
- District/State Director - Manages local office and outreach

Building Staff Relationships

- Ask for the retirement/tax Legislative Assistant when calling
- Treat staff meetings as seriously as legislator meetings
- Be a helpful resource, not just an advocate
- Follow up promptly on questions



FOLLOW-UP: THE KEY TO LONG-TERM SUCCESS

Within 24-48 Hours

- Send thank you email
- Answer any questions you couldn't address in the meeting
- Share meeting photo on social media (tag the legislator)
- Report back to the ARA Government Affairs team

Ongoing Relationship Building

- Send occasional updates on local retirement issues
- Thank them when they support your positions
- Invite them to visit your office or events
- Write letters to editor highlighting their support
- Attend their town halls and district events

KEY CONGRESSIONAL COMMITTEES

Know where your legislators serve to understand their influence on retirement policy

The "Four Corners"

HOUSE:

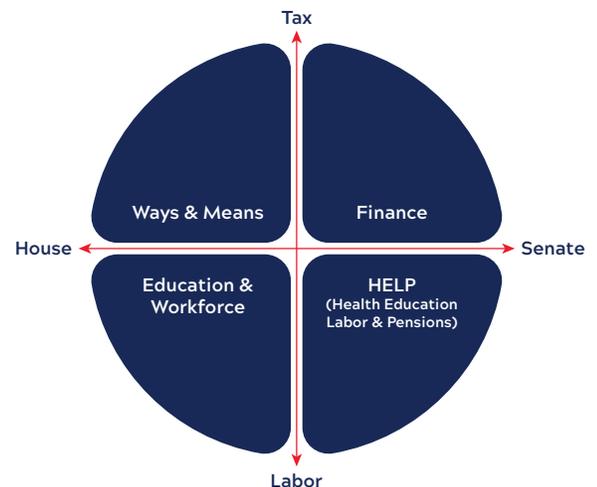
- **Ways & Means** - Tax policy, Social Security, retirement accounts
- **Education & Workforce** - ERISA, employee benefits

SENATE:

- **Finance** - Taxation, Social Security, pensions
- **HELP** - Workforce retirement systems, employee benefits

Other Important Committees

- House Financial Services
- Senate Banking
- Senate Special Committee on Aging



EMERGENCY CONTACTS & RESOURCES

Need help or have questions?

- ARA Advocacy: ARAadvocacy@usareirement.org
- ARA Advocacy Materials: araadvocacy.org/ara-advocacy-materials
- Congressional Information: www.congress.gov

Remember: You are the expert on retirement policy's real-world impact. Your voice matters, and your legislators need to hear from you.

This toolkit was prepared by the American Retirement Association to help retirement professionals effectively advocate for sound policy on Capitol Hill.