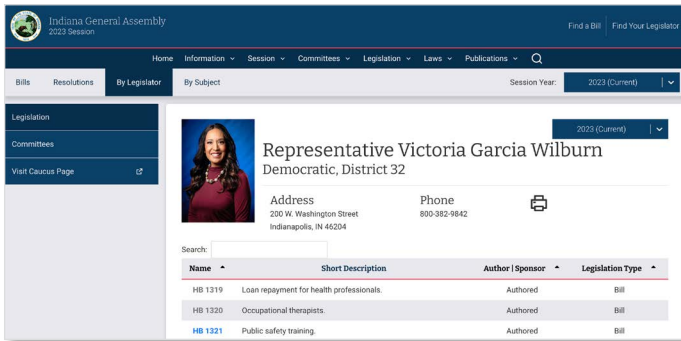


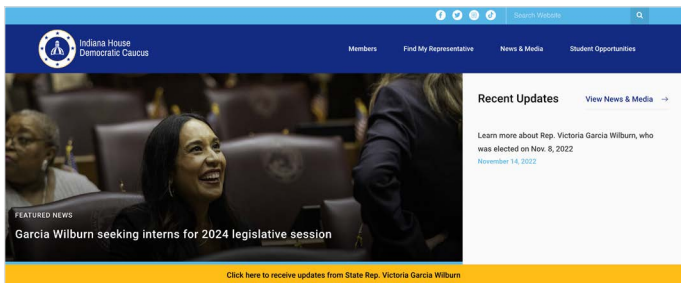
After you identify your elected officials:

1. **Review Additional Information:** Each legislator's profile will provide details on legislation they're involved with, committee assignments, contact information and their caucus website.



2. **Connect/Follow Your Elected Officials:** Visit your State Senator or State Representative's profile on their Caucus website to find their social media accounts, email address and newsletter sign-up forms. This is a great way to stay informed about the issues they are working on.

In the example below, you can see Rep. Garcia Wilburn's profile on her caucus page.



COMMUNICATING WITH LEGISLATORS

Effectively communicating your knowledge of and concern with issues to legislators is an essential part of our success at the Statehouse. However, navigating the complex world of legislative advocacy can be challenging, especially when it comes to the do's and don'ts of communicating with legislators.

Whether it's in writing or in person, presentation can be the deciding factor as to whether our correspondence is in the "first response" or the "reply later" file. By following these guidelines, you can make sure your messages reach your intended legislator and have the intended impact.

General Communication Tips

DO'S

- Mention (if possible) the specific bill in question. When you are writing about a specific piece of legislation, a House bill is identified as H.B. with a four-digit number and a Senate bill as S.B. with a two-digit number.
- Mention that you are a constituent or that your business is in the district. Ideally, you can mention a common thread you and the legislator share, such as children attending the same school.
- Clearly state the reason for your message early in your correspondence.
- Be prepared to address the "other side's" argument.
- Let INCPAS staff know about your outreach and any responses from legislators.

DON'TS

- Discuss political contributions.
- Use technical terms or acronyms—legislators are not experts on every issue.
- Remind the legislator you are a taxpayer.
- Guess, be vague or deceptive if you don't know the answer to a question—this can ruin your credibility.

Written Communication Tips

- Use your business letterhead.
- Address only one issue per correspondence.
- Clearly state the reason for your message early in your correspondence.
- Double-check the facts you are presenting to ensure they are accurate.
- Ask your legislator for a reply that states their position and include your return address/phone number/email address.
- Review your message for correct grammar and punctuation.
- Send your message before action is taken.
- Avoid using form letters. If there is a call to action, INCPAS will provide you with a template, but you are strongly encouraged to personalize this message.

In-Person Communication Tips

- In-person communication is best if you can secure an appointment, arrange a call or virtual visit, or meet the legislator in the district over coffee or lunch.
- Be on time and realize you may only have a few minutes with the legislator or their aide.
- Come prepared to discuss the issue at hand. If you are visiting a legislator on behalf of INCPAS, the Advocacy team will send you talking points.
- If you are asked a question and are not sure about the answer or position, be honest and say you will get back to them with an answer. Then, be sure to do so.
- Members who are most successful in building relationships with their legislators take the time to invite them to their office to meet with staff periodically, or host a breakfast or lunch at a local restaurant and invite other CPAs for information discussions.

LETTER/EMAIL TEMPLATES

Whenever INCPAS asks you to reach out to your legislator, we will include sample templates for you to easily personalize. Refer to the following pages for a few suggested templates for common situations advocacy volunteers will come across.

Introduction Letter or Email to Legislator

It's important to begin to develop a relationship with your elected officials. The introduction message lets your senator or representative know who you are and how the Indiana CPA Society can be a valuable resource to them throughout the year.

[Insert Date]

The Honorable [Insert Senator's Name]
Address City, State, Zip Code

Dear [Sen./Rep.] [Insert Last Name]: On behalf of CPAs throughout your district, I want to thank you for the important work you do and to wish you a successful 2024 session of the Indiana General Assembly.

I am a constituent in your district and am a Certified Public Accountant or accounting professional. As a trusted business advisor, I understand many of the complex issues you will be faced with in this upcoming legislative session. I hope you keep myself and the Indiana CPA Society in mind and reach out to use us as a resource.

In addition to its membership of nearly 7,000 CPA and accounting professionals, the Society has several advisory councils that research and discuss how proposed legislation will impact not only the CPA profession, but also Indiana businesses. CPAs serving on the Government Relations and Tax Resource Advisory Councils, as well as ad hoc working groups, are extremely knowledgeable and look forward to being of assistance when needed.

During your term in office, if the Indiana CPA Society or I can be of any assistance to you, please contact me at [Contact Information]. I look forward to the opportunity to work with you during this legislative session.

Sincerely,
[Your Name]
[Contact Information]