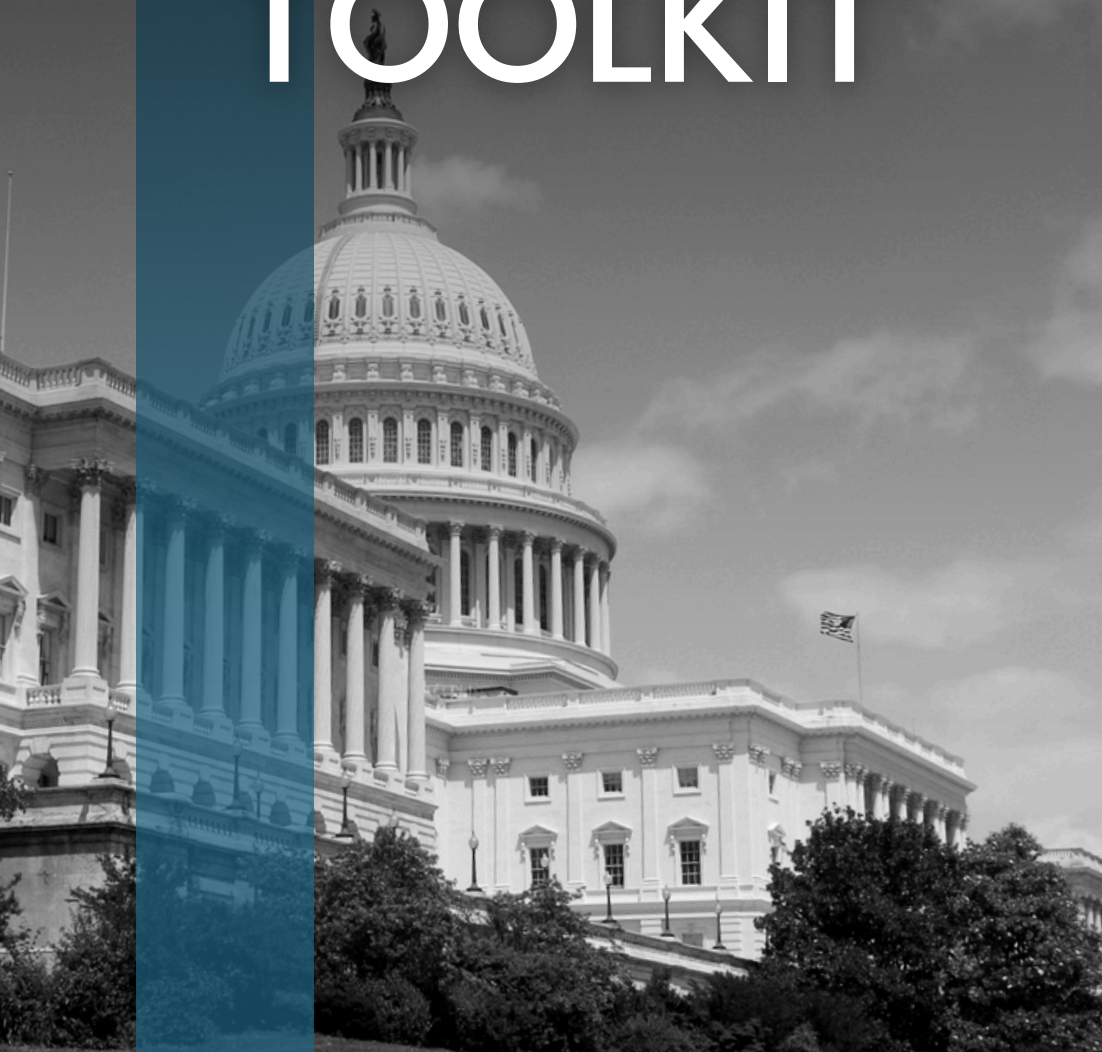


THE LITIGATION FINANCE ADVOCACY TOOLKIT



PRESENTED BY:

 **LF Dealmakers** + **INVENIO** **LLP**
WE FIND THE WAY

Developed for the LF Dealmakers Advocacy Workshop and created in partnership with Invenio, this Toolkit is a first-of-its-kind resource offering practical guidance for litigation finance professionals seeking to influence policy and public perception. It reflects the shared commitment of LF Dealmakers and Invenio to strengthening the industry's collective voice.

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THE LITIGATION FINANCE INDUSTRY IS FILLED WITH EXPERTS ON ADVOCACY.

Trial lawyers who use litigation funding spend their entire lives honing their craft as storytellers – using words, pictures, and video – for judges and juries.

Litigation finance funds commit significant resources to being able to understand and assess the power of these trial lawyer advocates. Part of the strength of their investment decision depends on it.

The industry has an innate ability to succeed at advocacy.

BUT POLITICS IS VASTLY DIFFERENT THAN LITIGATION:

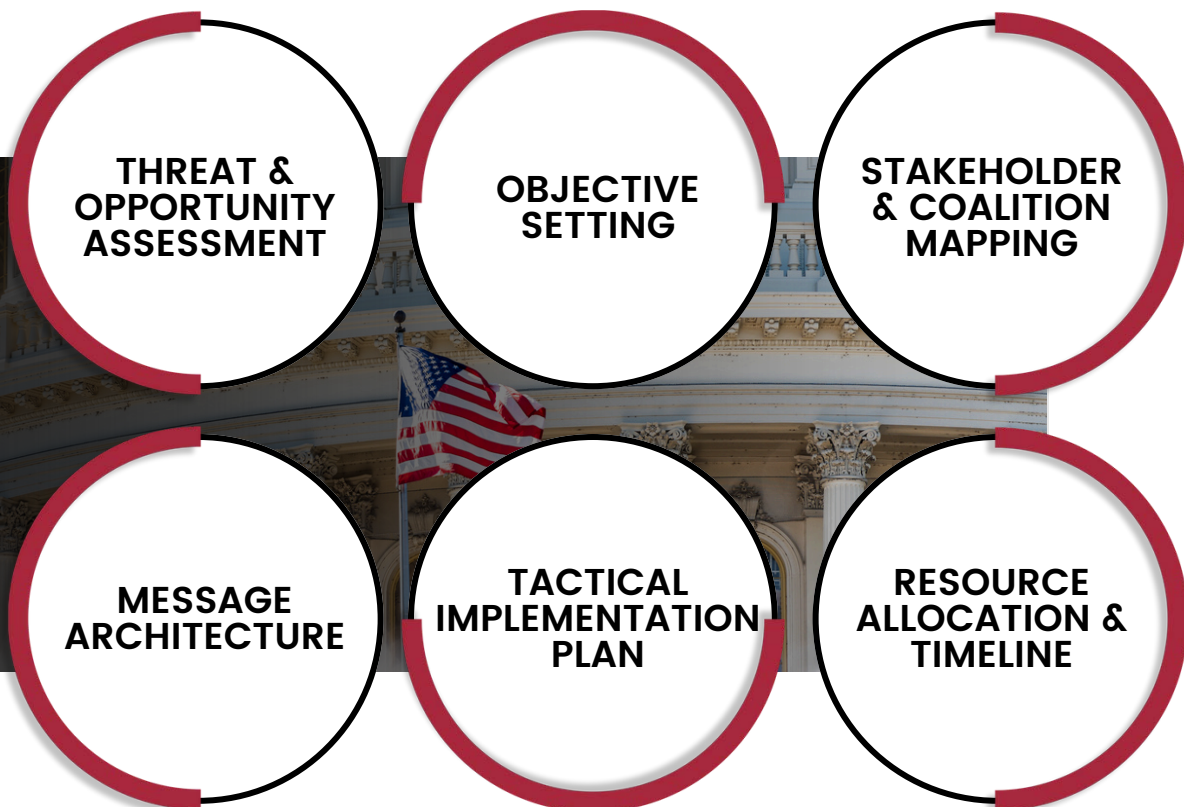
- Trials eventually end, but politics is a perpetual process. Although legislative sessions are cyclical, bills can be reintroduced, and the need for awareness and advocacy never stops.
- There are very few rules and there is no judge to mediate or control when and how each side advocates.
- A sophisticated political advocacy operation is multi-pronged, year-round, and highly digital.
- Reactive engagement costs far more, and is far less effective, than proactive engagement.

THE TOOLKIT

1. **STRATEGY** What are your goals and what do you need to do to achieve them?
2. **MESSAGE** What ideas are you communicating? What do you want? What are your opponents saying? How can you change the narrative?
3. **RESEARCH AND DATA** What supports the ideas in your message or the thing you're asking for? What do you know about what your opponents are doing?
4. **STAKEHOLDERS AND ADVOCATES** Who are the right people to communicate the message to which targets? Are they prepared to carry out the plan?
5. **TARGETS** Who needs to hear the message? Who can do something about what you want? Who can help you get to other targets?
6. **MATERIALS** What resources do you need, and in what formats, to help educate both stakeholders and targets and make it easier for them to do the things you're asking?

A proactive strategy accounts for timing, resources, and the legislative or regulatory context in which your advocacy is occurring. This includes building a plan that accounts for the other noise taking up attention in the political world while you are trying to be heard. Think of it as a business strategy applied to the political arena: you're competing for favorable policy outcomes against well-funded opponents.

CORE COMPONENTS OF ANY ADVOCACY STRATEGY



ACCOUNTING FOR POLITICAL REALITIES

Your strategy must adapt to:

- **ELECTORAL CYCLES:** What's achievable in election years vs. off-years?
- **ECONOMIC ENVIRONMENT:** How current conditions affect receptivity to your message
- **SCANDAL/CRISIS CYCLES:** When to advance, when to lay low, when to pivot
- **OPPOSITION RESEARCH CYCLES:** Anticipating when, and from whom, attacks will come
- **POWER AND PERSONNEL SHIFTS:** Changes in party control, leadership, committee membership, and staff

LITIGATION FINANCE ADVOCACY STRATEGY OUTLINE

CURRENT REALITY CHECK

- **MULTI-FRONT THREAT ENVIRONMENT:** Tax, disclosure, foreign investment restrictions, cost narratives
- **FRAGMENTED INDUSTRY RESPONSE**
- **LIMITED POLITICAL INFRASTRUCTURE**

STRATEGIC OBJECTIVES

- **DEFENSIVE:** Stop harmful tax and regulatory proposals
- **OFFENSIVE:** Establish industry as access-to-justice champion
- **RELATIONSHIPS:** Build permanent political infrastructure



KEY TACTICS



COALITION BUILDING

- Small business groups (contract enforcement)
- IP protection advocates (innovation theft)
- Access to justice organizations (leveling playing field)



MESSAGE DISCIPLINE

- Lead with claimant stories, not industry economics
- Frame as American fairness
- Emphasize merit-based case selection
- Don't use a message in one situation that contradicts or undermines messages used in other situations



POLITICAL INFRASTRUCTURE

- Build relationships before you need them
- Use quiet periods for coalition building
- Coordinate defense with proactive messaging



TIMING AND SEQUENCING

- Relationship mapping
- Bipartisan approach focusing on shared values
- State-level engagement in key districts



COMMUNICATION, COORDINATION, AND PREPARATION

- Gather information and disseminate it across the industry
- Test and refine effectiveness of messages
- Bring together advocates at the national, state, and district levels
- Plan what messages to communicate to various stakeholders and audiences
- Train advocates how to do the work
- Ensure awareness of who's doing what where

SUCCESS METRICS

- Legislation/regulation stopped, passed, or modified favorably
- Legislative champions developed
- New coalition partnerships established
- Key industry advocates identified
- Media narrative shifted toward access-to-justice framing
- Industry viewed as responsible, appropriately regulated sector
- Rapid response capability established



**“STRATEGY WITHOUT EXECUTION IS
JUST PLANNING.
EXECUTION WITHOUT STRATEGY IS
JUST ACTIVITY.”**

IN ORDER TO HAVE INFLUENCE, ADVOCATES MUST GET LAWMAKERS TO LISTEN.

Why should lawmakers listen? Why should they care, and why would their supporters and constituents care? And if you can get a lawmaker's attention, what do you want them to do? How does this benefit them? MESSAGE answers these questions.

THERE ARE TWO LEVELS OF MESSAGE DEVELOPMENT.

01

THE BROAD THEMATIC AND FOUNDATIONAL REASON WHY LAWMAKERS SHOULD CARE AT ALL.

This message must be compelling and illustrated by stories about constituencies lawmakers understand and care about. No matter what perspective these stories are told from, the core message is always the same.

Landing this message correctly lowers an advocate's barrier to entry with lawmakers. It's what gets you in the door in the first place.

02

THE MORE TECHNICAL LEVEL OF MESSAGE RELATED TO A SPECIFIC ISSUE.

This includes details about particular matters, such as disclosure or tax rate on gains. These messages will have considerable variation because they are tailored to specific proposals or challenges. In the end, however, these messages must relate back to the core message and why a lawmaker should listen.

We address only the first level of core messaging in this initial iteration of the toolkit and we provide a core message that reflects carefully on the industry's strengths as well as on anti-litigation finance narratives.

The process of building and reinforcing a message starts with compelling stories and strong foundational points that resonate. You must always build a message with an appreciation of your targets' receptiveness and your opponents' strategy, strengths, and weaknesses.

Our opponents tell a story that accuses the litigation finance industry of manipulating the justice system for profit. Our core message must be rooted in the story of fairness and equal access.

"LITIGATION FINANCE ENSURES THAT THE COURTHOUSE DOOR STAYS OPEN TO EVERYONE, NOT JUST THE WEALTHY AND WELL-CONNECTED."

THE MESSAGE PARADIGM:

ACCESS TO JUSTICE VS. SYSTEM MANIPULATION

OUR NARRATIVE: LITIGATION FINANCE WORKS TO PROVIDE ACCESS TO JUSTICE IN A VARIETY OF WAYS.

FAIR FIGHT Everyday Americans individuals are locked out of court because of steep legal costs. When they do get into court, defendants try to escape accountability by using their resource advantage to prolong the process and spend plaintiffs into submission.

FAIR COMPENSATION People who have been injured are unable to seek compensation or are forced to settle for less than they deserve – they can't afford to go up against the deep-pocketed companies who are responsible for the injury.

PROTECTING SMALL AND MEDIUM SIZED BUSINESS Larger corporations hold the upper hand in all manners of commerce, from everyday trade to large-scale consequential contracts.

PROTECTING INNOVATION Innovation is stolen, misappropriated, or stifled with relative impunity from inventors who can't afford to fight back.

THE OPPOSITION'S NARRATIVE: LITIGATION FINANCE IS JUST MANIPULATING THE SYSTEM.

FRIVOLOUS LITIGATION Frivolous lawsuits are flooding an already jammed legal system, generating higher costs that are passed on to consumers, shareholders, and stifle business innovation and growth.

FOREIGN INFLUENCE Foreign investors and enemy governments are manipulating American courts, threatening national security, and dodging their fair share of tax.

FUNDERS EXERT INAPPROPRIATE CONTROL Litigation funders interrupt the attorney-client relationship, exert undue influence in lawsuit outcomes, ensure outcomes fit their needs rather than law firm clients, and generally disrupt and manipulate the process of dispute resolution in the United States.

"IF YOU DON'T DEFINE YOURSELF, YOUR OPPONENTS WILL DEFINE YOU."

KNOW YOUR AUDIENCE BUT MAINTAIN A COHERENT MESSAGE STRATEGY

The core message is a foundation on which to build communications tailored to the audience you are trying to reach. Here are some examples of how the core message proposed above can be presented with different contexts in mind.

CONSERVATIVE APPEAL



FREE MARKET

"Government shouldn't pick winners and losers in the capital markets."



PROPERTY RIGHTS

"Protecting intellectual property and contracts drives innovation."



ANTI-ELITE

"Don't let big corporations buy their way out of accountability."

PROGRESSIVE APPEAL



ACCESS TO JUSTICE

"Equal justice under law shouldn't depend on your bank account."



CORPORATE ACCOUNTABILITY

"Hold powerful interests accountable for harm they cause."



CONSUMER PROTECTION

"Protect everyday Americans from corporate wrongdoing."

BUSINESS COMMUNITY APPEAL



LEVEL PLAYING FIELD

"Small and mid-size businesses deserve the same legal tools and access as Fortune 500 companies"



CONTRACT ENFORCEMENT

"Strong contract enforcement benefits all businesses."



INNOVATION PROTECTION

"Protect American innovation from theft and infringement."

POLICYMAKER APPEAL



EFFECTS ON CONSTITUENTS

"This is how litigation financing is helping people in your state/district get the justice they deserve - they're real people, not hypothetical scare tactics."



RELIABLE RESEARCH AND DATA ARE ESSENTIAL

POLITICAL MESSAGING GETS ATTENTION. RESEARCH AND DATA WIN POLICY DEBATES.

Effective advocacy operates on two levels simultaneously:

01 THE EMOTIONAL APPEAL THAT CAPTURES ATTENTION

02 THE EMPIRICAL FOUNDATION THAT JUSTIFIES ACTION

Legislators may be initially drawn to your cause by compelling stories or political alignment, but they need credible data to:

- Defend their positions to colleagues, constituents, and media
- Draft effective legislation that addresses real problems with appropriate scope
- Counter opposition arguments with factual rebuttals
- Build bipartisan support through objective evidence
- Satisfy staff analysis requirements for legislative process
- Justify legislative provisions with regards to stringent budget and cost implication rules

Research and data come from different sources and have varying degrees of depth and credibility, depending on who produced the research, methodological rigor, and the robustness of reported data. This credibility hierarchy matters.

Government data carries the most weight, followed by peer-reviewed academic research, then established think tank analysis, then industry-commissioned studies.

SMART ADVOCATES BUILD THEIR CASE USING MULTIPLE TIERS OF THIS HIERARCHY.



EXAMPLES OF DATA WITHIN EACH CATEGORY



GOVERNMENT DATA SOURCES

GOLD STANDARD

- Data reported regularly by state and federal agencies, such as DOJ, Treasury, SEC, or FTC
- Congressional research services and GAO reports
- Court administration data and case flow statistics, such as those produced by the Federal Judicial Center



ACADEMIC OR CENTERS OF EXCELLENCE RESEARCH

HIGH CREDIBILITY

- Peer-reviewed journals in law, economics, and public policy
- University research centers focused on civil justice, access to justice
- Law school clinical programs with empirical research components



THIRD-PARTY VALIDATORS

STRATEGIC VALUE

- Established think tanks with track records across political spectrum
- Professional associations with research arms
- Non-profit organizations focused on civil justice reform



INDUSTRY OR COALITION- DEVELOPED RESEARCH

TACTICAL SUPPORT

- Industry-commissioned studies from credible academic institutions
- Joint research projects with allied organizations
- Original survey research of stakeholders and beneficiaries

THE GOAL ISN'T JUST TO COMMISSION FAVORABLE RESEARCH, BUT TO BUILD A COMPREHENSIVE EVIDENTIARY FOUNDATION THAT CAN WITHSTAND SCRUTINY AND COUNTER OPPOSITION ARGUMENTS WITH FACTS, NOT JUST RHETORIC.

EXAMPLES: MATCHING MESSAGE TO RESEARCH AND DATA

THERE IS A VAST UNMET “JUSTICE NEED” IN CIVIL LITIGATION IN THE UNITED STATES. ENABLING LAW FIRMS THAT CAN REPRESENT PLAINTIFFS ON CONTINGENCY FEES INCREASES ACCESS TO THE COURTHOUSE.



ACADEMIC RESEARCH WITH EMPIRICAL DATA

A 2024 study from the Washington University Law Review that examined ten years of data from NYC courts concluded that “contingent fees seem to have, at least partly, solved the access-to-justice problem in tort litigation.”



INDUSTRY RESEARCH STUDY

Small business legal access presents another critical gap. LegalShield, a pre-paid legal services businesses, released a 2025 survey that found 13 million small businesses (60% of all small businesses) experienced significant legal events in the past two years, yet 54% did not seek attorney services and 40% cited cost as a barrier.



CENTER OF EXCELLENCE RESEARCH

The National Center for State Courts’ Civil Litigation Cost Model shows median litigation costs of \$43,000–\$122,000 depending on case type – and this data is from 2013. Costs have only increased and this credible study shows a high barrier to courthouse access for people who have to pay their own costs.

LARGE-SCALE PLAINTIFFS LITIGATION OFTEN FILLS GAPS GOVERNMENT ENFORCEMENT EFFORTS ARE UNABLE TO ADDRESS.



ACADEMIC RESEARCH

Professor Maria Glover’s 2012 William & Mary Law Review study documenting systematic enforcement gaps across regulatory agencies offers a strong argument and theoretical framework for how “private regulation through litigation is integral to the structure of the modern administrative state.” She notes the gap in public law regulatory enforcement and calls private enforcement regimes essential to our form of government.



GOVERNMENT RESEARCH

GAO research shows how agencies were facing resource constraints before the radical reduction in federal workforce that began in 2025. The GAO’s 2025 High-Risk Series identifies a \$696 billion gross tax gap for 2022, with agencies facing continuing budget uncertainties and skills gaps in federal workforce across multiple regulatory areas. Resource limitations force agencies to prioritize enforcement actions, leaving many violations unaddressed.

EFFECTIVE CAMPAIGNS REQUIRE MULTIPLE PEOPLE AND ORGANIZATIONS WORKING COLLABORATIVELY.

Stakeholders are all the people who are or could be affected by, involved with, or allied to an issue, and they all have the potential to become advocates. Stakeholder and advocate relationships need to be cultivated early and managed carefully.

In the litigation finance industry, the primary stakeholder advocates fit into three categories: funders, users, and plaintiffs. Additional existing and potential advocates include trade and industry associations, nonprofit organizations, elected officials, and third-party validators.

INDIVIDUAL PLAINTIFFS

- Personal injury victims
- Product liability victims
- Mass accident/disaster and environmental exposure victims
- Employment discrimination victims
- Sexual assault and harassment victims
- Consumer fraud victims
- IP, privacy, and data breach plaintiffs
- Specialty “citizens’ lobby” or grassroots organizations comprising these plaintiffs

FUNDERS

- Funds focused entirely on legal assets
- Multi-strategy funds focused on legal assets as one asset class
- Family offices
- Institutional investors and pension funds participating in alternative investments
- Fundless sponsors
- Brokers and syndicators facilitating the deployment of capital
- Distressed debt traders and special situation funds that work in legal assets
- Special advisors and outside counsel to all of these participants
- Trade associations representing industry participants

LAW FIRMS

USERS

- Plaintiff-side commercial litigation firms
- IP litigation boutiques
- Mass tort and personal injury firms
- Specialized plaintiff-side practitioners
- BigLaw and other more traditional firms participating in funding for contingent cases
- Class action law firms
- Trade associations and professional societies made up of these law firms

BUSINESSES

- Small to medium businesses in contract or other commercial disputes
- Startups and inventors protecting IP
- Corporate legal departments with portfolios of claims

MESSAGE ALIGNMENT

COALITION PARTNERS

**ACCESS TO JUSTICE AND
LEGAL PROFESSIONAL
ORGANIZATIONS**

"Equal justice under law shouldn't depend on your bank account. Legal finance levels the playing field so cases are decided on their merits, not financial resources."

**INTELLECTUAL PROPERTY
& INNOVATION
PROTECTION GROUPS**

"Innovation shouldn't be allowed to be stolen just because the thief has deeper pockets. Creators and inventors deserve to be able to protect their intellectual property."

**CONSUMER PROTECTION
AND CIVIL RIGHTS
ORGANIZATIONS**

"When corporations cut corners and people get hurt, victims shouldn't be silenced by the cost of seeking accountability."

THIRD-PARTY VALIDATORS

"Litigation financing arrangements comply with existing rules and standards including control and attorney-client privilege, and provide legal and ethical avenues for injured parties to seek justice."

**SMALL BUSINESS
ORGANIZATIONS**

"Small businesses deserve the same legal tools as Fortune 500 companies to enforce contracts and protect their innovations."

**ELECTED OFFICIALS
AND POLICYMAKERS**

Look for lawmakers who have taken positive public positions on litigation financing or on related matters



Lawmakers are the most common target of advocacy from the litigation finance industry and are the initial focus of this toolkit. Future iterations and updates will address executive branch and regulatory advocacy efforts in greater detail. **Selecting and planning for your target audience requires advocates to know:**

WHO

**WITHIN THE LAWMAKER'S
UNIVERSE PLAYS WHAT ROLE**

WHEN

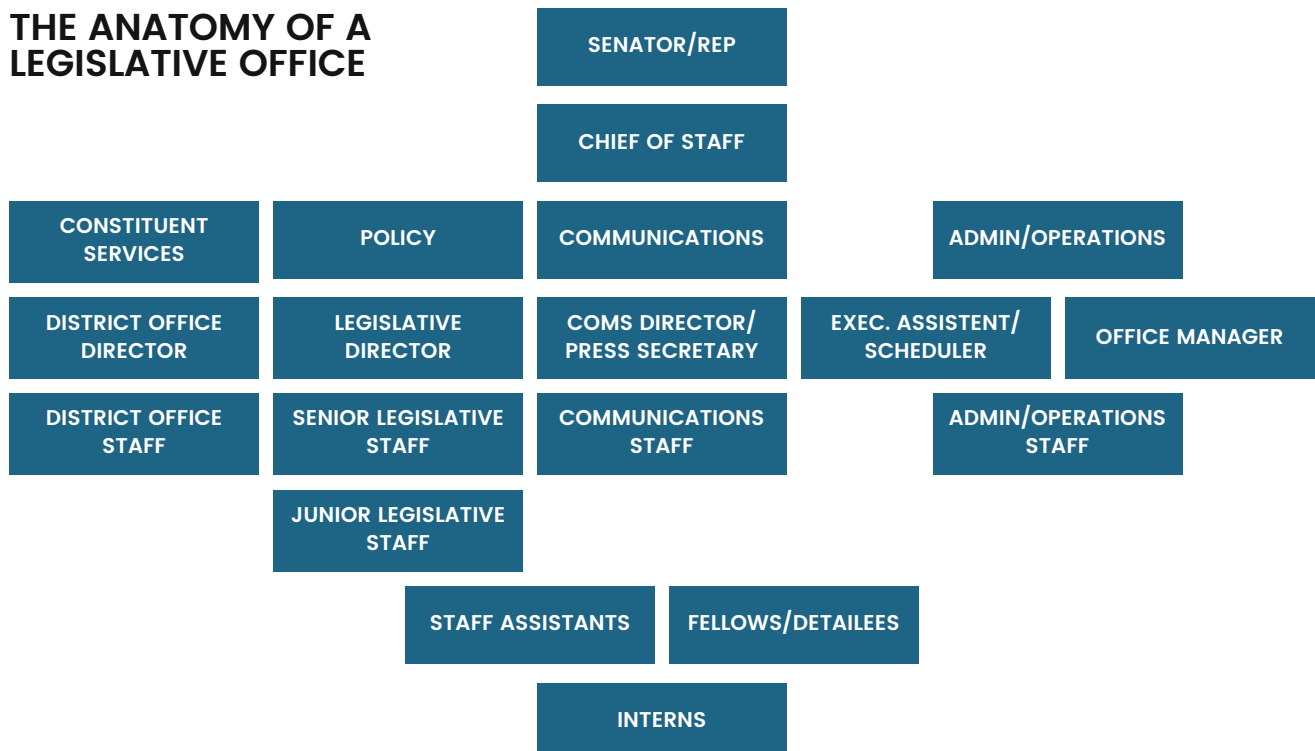
**IN AN ADVOCACY CYCLE TO GET THE
RIGHT MESSAGE TO THE RIGHT PERSON**

WHO TO TALK TO?

CONGRESSIONAL OFFICE ROLES AND RESPONSIBILITIES

Congressional offices are typically structured as small businesses with 15-25 staff members (House) or 25-50 staff members (Senate), split between Washington D.C. and district/state offices. Understanding this hierarchy is crucial for effective advocacy targeting.

THE ANATOMY OF A LEGISLATIVE OFFICE



A CONGRESSIONAL OFFICE ESSENTIALLY BREAKS DOWN INTO 5 VERY IMPORTANT FUNCTIONS:

1. SENIOR STAFF – DECISION MAKERS

Chief of Staff, Deputy Chief of Staff, Chief Counsel, and/or Legislative Director. In a Congressional committee, the Majority Staff Director reports to the Chairman and the Minority Staff Director to the Ranking Member.

- These are the “CEOs” of the Congressional office and can grant or deny access to the Member.
- Yet, given the breadth of their duties, they rely upon legislative assistants or other policy staff or counsel to advise them on details that lead to a decision.

2. POLICY STAFF

These staff are legislative assistants, legislative directors, and committee professional staff.

- These are experts on specific areas of policy, typically organized by committee jurisdictions, such as Judiciary, Tax & Finance, Budget, or Commerce.
- Legislative Assistants for a policy area of interest are the most important substantive contact an advocate will have on an issue. They are influential enough to make a difference but accessible enough that they are charged with maintaining relationships with important advocates.

3. COMMUNICATIONS

- This will include the Press Secretary and deputies and may include senior communications staff in large offices who are responsible for overall strategy.
- These staff rarely make decisions on who gets seen or listened to but they are critical if the advocate needs the Member to make public statements on this issue of concern.

4. DISTRICT OFFICE

- Can help pre-screen issues on some occasions and coordinate in-district appearance opportunities.
- Can be very helpful in local coalition building and bringing DC office attention to important developments in the home district.

5. ADMINISTRATIVE AND SCHEDULING

These are often the most junior level professionals – such as staff assistants and schedulers – but they are critically important.

- These people are often the first to raise issues to superiors on grassroots stakeholder issues they are hearing about in phone calls and correspondence.
- And they are critical to advocates getting time with appropriate staff or with Members.

TARGETING ADVOCACY BY ROLE: WHO TO TALK TO ABOUT WHAT?

Advocates should carefully consider who in a legislative office is the best suited to address the “ask” of the day. This will depend on where an advocate is in a legislative cycle, whether they are building relationship capital for a later date, whether there is a specific policy they are reacting to, and how urgent the time frame is. Even in the most urgent scenarios, an effort targeted to someone too junior or too senior can be viewed as a tactical misfire, and can waste valuable opportunity.

Below is some basic guidance on which staff to contact about what, and about the motivations driving various staffers:

FOR INITIAL MEETINGS

- Legislative Assistant covering your issue area
- Legislative Director (if senior-level meeting)
- Committee Staff (for committee members)

FOR ONGOING RELATIONSHIPS

- Legislative Assistant (your primary contact)
- Communications Director (for message coordination)
- Scheduler (for continued access)

FOR HIGH-LEVEL ASKS

- Chief of Staff (for major decisions)
- Member directly (for final commitments)

FOR LOCAL/DISTRICT ISSUES

- District Director (home state perspective)
- Field Representatives (local coalition building)



OFFICE CULTURE AND DYNAMICS

HOUSE VS. SENATE DIFFERENCES

- **House:** Smaller staffs, more generalist roles, faster paced
- **Senate:** Larger staffs, more specialists, longer-term focus

MAJORITY VS. MINORITY

- **Majority:** More legislative power, busier schedules, higher profile
- **Minority:** More oversight focus, more accessible, longer-term relationship building

COMMITTEE LEADERSHIP

- **Chairs:** Control agendas, busier schedules, more formal processes
- **Ranking Members:** Opposition perspective, often more accessible
- **Regular Members:** Less formal, more relationship-focused



RELATIONSHIP BUILDING INSIGHTS

- **Junior Staff:** Hungry for information, education, and career development
- **Mid-Level Staff:** Focused on policy impact and professional advancement
- **Senior Staff:** Concerned with Member priorities and political implications
- **Long-term Staff:** Often most influential due to Member trust

Tip: Match your ask to the role – start with LAs, cultivate LDs, and escalate to Chief of Staff/Member when aligned

TARGETING ADVOCACY TO THE LEGISLATIVE CYCLE

In addition to understanding who to target, advocates must carefully plan when to undertake different types of advocacy within a legislative cycle.

ADVOCACY BREAKS DOWN INTO THE FOLLOWING BROAD CATEGORIES:



RELATIONSHIP BUILDING:

This is a constant “always” task, working to lower that barrier to entry for when you most need a relationship and ensuring that your core message is heard and your “wins” are communicated.



EARLY POLICY EDUCATION:

Advocates should be educating target staff early and often on upcoming issues in cyclical bills (budget or appropriations), regarding specific legislation, or as a preview of efforts expected within the current legislative cycle.



DRAFTING & SHAPING LEGISLATION:

Advocacy begins to intensify in regularity and specificity during the drafting and shaping of legislation. Targets begin to shift to specific policy leaders and counsel while never leaving behind legislative assistants integral to the early process.



MOBILIZING FOR FLOOR CONSIDERATION:

This is the highest frequency stage of advocacy and the most likely to include contact with Members or senior staff.

SCALING ADVOCACY ACROSS THE LEGISLATIVE CYCLE

Match cadence, targets, and tactics to the bill’s stage

EARLY: EDUCATE AND FRAME

- LA: 1-pager; district impact stats; short briefings
- LD: policy landscape memo; stakeholder map; target committee/caucuses
- Committee Staff: backgrounders; suggested hearing Qs; expert intros
- District Team: schedule site tours; local roundtables

DRAFTING: SHAPE THE TEXT

- LD / Member’s Counsel: draft redlines; amendment language; Q&A
- Committee Counsel: section-by-section + score notes; technical edits
- Communications Director: message frames; FAQs; stakeholder quotes
- Coalition Leads: joint letters; expert validators; coordinated asks

FLOOR/CONSIDERATION: MOBILIZE

- Member / Chief of Staff: commitment ask; vote posture; fallback paths
- Leadership / Whips: priority arguments; rule/procedure asks; count updates
- Communications Director: op-eds; surrogates; rapid media coordination
- District Dir / Field Reps: patch-throughs; district validators; event surges
- Allies: activation windows; social + email blasts; real-time monitoring

ALWAYS-ON RELATIONSHIP BUILDING

- Monthly/quarterly touchpoints
- District event/site tours
- Concise updates
- Thank-yous

Intensity

Time / Bill Lifecycle

Messages and supporting research need to find their way into lawmakers' hands when an advocate is both seeking and following through with getting a target to listen.

These materials must be carefully drafted and organized. And while the core message, repeated over and over in various contexts, is often driven by visual and digital media strategy, there are some essential documents that every advocate must be aware of and have access to:



ONE-PAGER

A simple and compelling issue brief for lawmakers that covers core and specific messaging. This quickly educates or reminds key lawmaker staff why they should listen. This is a “leave behind” for a visit or a tool to get in the door.



STAKEHOLDER MOBILIZATION EMAIL

When an advocacy effort requires a high-volume response in support or opposition to an issue, those leading the effort need to prepare form communications that can be sent by platform-based stakeholder management tools.



DRAFT SOCIAL MEDIA POST

Make it easy for stakeholders to post support or opposition on issues; or to issue a call-to-action to networks as force multipliers.



DRAFT LETTERS AND PHONE CALL SCRIPTS:

Provide stakeholders with letter templates and phone call scripts to follow when contacting a legislative office to register opposition to or support for an issue.



STAKEHOLDER ISSUE BRIEF/TALKING POINTS

Educate all of the stakeholders about why lawmakers need to hear from them and give them a digestible education. They will feel better prepared and supported by the organization asking them to advocate.



SUGGESTED TARGET MAP

Explain to stakeholders who is a target lawmaker and why they matter.



DEAR COLLEAGUE LETTER

A letter, often proposed initially by the advocate but used by the lawmaker's office to gather the support of other lawmaker colleagues in supporting or opposing an issue.



SAMPLE MATERIALS, GUIDES, AND ADDITIONAL RESOURCES

01

BEST PRACTICES FOR
COMMUNICATING WITH
LAWMAKERS

02

REQUESTING AND
PLANNING A
LEGISLATIVE MEETING

03

SAMPLE MEETING
REQUEST EMAIL

04

ANATOMY OF A
CONGRESSIONAL OFFICE:
ROLES AND RESPONSIBILITIES

05

STAKEHOLDER
MAPPING MATRIX

06

ADDITIONAL RESOURCES
COMING SOON



ABOUT DEALMAKERS FORUMS

Dedicated to delivering high-impact event experiences, Dealmakers Forums serves senior executives across the legal, finance, and technology industries. With an unwavering commitment to quality, the platform distinguishes itself through a results-driven approach that emphasizes one-to-one meetings and meaningful networking. By curating expertly crafted content, featuring top-tier speakers, and fostering valuable connections, Dealmakers Forums delivers actionable insights and drives real business outcomes.

Its flagship events — LF Dealmakers, the premier conference for litigation finance, and IP Dealmakers, the leading forum for driving intellectual property value — are essential gatherings for industry leaders. Known for their exceptional content, influential speakers, and highly effective one-to-one meetings, these events have become indispensable hubs for dealmaking and strategic collaboration. For more info, visit dealmakersforums.com.



ABOUT INVENIO

At Invenio, we transform outcomes in litigation finance—and beyond. Our name means “to find,” and that’s precisely what we do—discover opportunities others miss, execute transactions others can’t, and recover value others won’t. As a leading provider of legal and strategic advisory services for those navigating the complexities of the litigation finance industry, our specialized focus and deep experience in legal underwriting, transactions, and value recovery empowers investors, law firms, and private credit managers to unlock the full potential of legal and specialty assets.

With decades of experience in legal and credit markets, we empower clients to navigate risk, seize opportunity, and realize superior results—whether investing in legal claims, executing structured finance transactions, or recovering value from challenged assets. For more, visit inveniolaw.com or contact us at contact@inveniolaw.com.