

## How to Set Up a District Meeting

### **Locating Your Legislator's Office**

- ◆ Log onto the NAIFA website
- ◆ Click on the Advocacy tab
- ◆ Scroll down and click on NAIFA's Legislative Action Center
- ◆ Under Elected Officials, type your zip code, click Go
- ◆ A list of your state and federal legislators will appear  
(NOTE: you may be prompted to type either your 9-digit zip code or your full home address if your 5-digit zip code splits into two congressional districts)
- ◆ Click on your representative's name to reach his/her profile
- ◆ Click the Contact tab to get the address and phone number of the district office  
(Click on *More District Offices* to get additional addresses and phone numbers)

### **Contacting Your Legislator's Office**

- ◆ Call the district office closest to you and ask for the scheduler.
- ◆ State that you are a constituent and would like a 15-20 minute appointment with your representative during the district work period (congressional recess).
- ◆ Offer the scheduler 3-4 different times that you can meet.
- ◆ State your name and whom you represent (e.g. your clients, your employees and NAIFA-local association).
- ◆ Tell the scheduler what issues you'd like to discuss with the representative.
- ◆ After your appointment is confirmed, offer to send issue papers to the legislator's office so that the legislator can familiarize him/herself with the issue(s) before the meeting and confirm the meeting in writing.

### **Best Practices**

- ◆ Bring 3-5 fellow NAIFA members with you to the meeting, especially those who know the representative and are well-versed in the legislative issue to be discussed.
- ◆ Do not be offended if the legislator cannot meet with you at the last minute. Usually, you will still be able to meet with a member of the legislator's staff. If the appointment is cancelled, request another one as soon as possible.
- ◆ Call the day before the appointment to double-check that the appointment is still on the legislator's schedule.
- ◆ Brief your team on the issues. Designate someone to open and close the meeting and someone to discuss each issue in depth.
- ◆ Tell the legislator why this issue is important to his/her constituents and the local economy.
- ◆ Tell the legislator how many clients you represent and some of their demographics (e.g. retirees, families with school age children, small business owners).
- ◆ Share personal stories (without breaching confidences) that illustrate the points you are trying to make on the issue.
- ◆ Leave your business card and the issue papers with the representative and offer to be a knowledge resource on insurance and financial services matters.
- ◆ Send a thank you note reiterating what was discussed at the meeting.
- ◆ Report the substance of your meeting to APIC at [apic@naifa.org](mailto:apic@naifa.org).