



NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS

MEETING TIPS Meeting With Your Elected Representatives

IN ORDER FOR YOU TO HAVE AN EFFECTIVE MEETING WITH YOUR LEGISLATOR(S), WE SUGGEST YOU ADHERE TO THE FOLLOWING GUIDELINES:

- Turn off your cell phone before you go into the meeting.
- Legislators have very busy schedules, so do not expect to meet with a member of Congress for more than 10-15 minutes. When your 10 to 15-minute period is up, start to say goodbye. Of course, if the legislator shows interest in meeting longer, you may stay as long as your schedule permits.
- Do not be offended if your member of Congress is unable to attend your scheduled meeting. The member's absence may be the result of numerous factors, including a vote on the House or Senate floor. If your legislator fails to show for your meeting, present your views to the staff person as you would have to your legislator and ask the staffer to relay your concerns to your legislator. Staff recommend courses of action to their members of Congress and inform them of constituent concerns. Members of Congress rely on their staff for guidance on legislative issues.
- State clearly who you are and the leadership position you hold in your association. State that you are representing the National Association of Insurance and Financial Advisors and your clients. If you know the number, mention how many NAIFA members are in your state association.
- Succinctly address the legislative issues you wish to discuss and give a reasoned explanation why the legislator should support NAIFA's position. Leave briefing materials and issue papers that explain NAIFA's position in greater detail with staffers. Attach your business card with the NAIFA business card jacket to the issue papers.
- Ask the legislator if you can expect his or her support on the legislation or issue. DO NOT be demanding or remind the legislator of political contributions that have been made to his or her campaign.
- DO NOT discuss campaign contributions from IFAPAC or yourself during a meeting regarding legislation.
- Thank the legislator and staff for their time and offer yourself and NAIFA's Government Relations Department as future resources for questions or concerns about insurance, tax, health care and financial services matters.
- Follow up with a thank you letter when you return home.