

# Tips for Meetings with Legislators

Before speaking with an elected official, refer to this cheat sheet with helpful tips for keeping your meeting on track, efficient, and effective.

- 1 Be on time.** Legislators and staffers often have meetings scheduled back-to-back. Call the day before the appointment to double-check that it is still on the legislator's schedule and maximize your time by making sure you aren't late. Don't be offended if the legislator cannot meet with you last minute. Usually, you will still be able to meet with a staff member.
- 2 Don't bring too many people.** Packing the room can feel intimidating. Bring 2-6 fellow NAIFA members with you to the meeting, especially those who know the representative and are well-versed in the legislative issue(s) to be discussed.
- 3 Prepare your team ahead of time.** Brief your group on the issues at least 24 hours before the meeting. Designate someone to open and close the meeting and someone to discuss each issue in-depth.
- 4 Be fully knowledgeable about the legislator's record on an issue.** Before a meeting have a clear understanding of the legislator's voting record or co-sponsorship of legislation you are discussing.
- 5 Be personal with your advocacy.** Tell your own story and weave in the key talking points. Tell them how many clients you represent and some of their demographics (e.g. retirees, families with school-age children, small business owners).
- 6 Communicate the impact on you, your family, your clients, and the community.** Let the legislator know how the local economy and people in their community could be impacted.
- 7 Follow up and send a handwritten note.** Leave your business card and any issue papers with the representative and offer to be a resource on insurance and financial services matters. Always send a thank you note after each meeting and follow up with any additional information requested.
- 8 Invite the legislator for a site visit or chapter meeting.** To continue building your relationship, ask the legislator to join you at your office to meet your colleagues and show them what you do each day. You can also invite your legislator to an upcoming NAIFA meeting.
- 9 Write a follow-up "take the temperature" email every six months.** Don't forget to check back in with the legislator's office every few months to provide updates or request another meeting. You can get a sense of where they stand and if they have changed their position on any key issues.
- 10 Report your meetings to NAIFA.** Send information about the meetings you hold and any photos that you took to [advocacy@naifa.org](mailto:advocacy@naifa.org).