

**Sample Appointment Request Letter**

Subject Line: Request for a Meeting

Dear Scheduler,

NAIFA members from [CITY/AREA] would like to request an appointment to speak with [CONGRESSMAN/SENATOR] \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ or a staff member regarding issues of importance to our industry in [HIS/HER] district. An agenda of those items are included below:

[LIST MAIN TOPICS TO BE DISCUSSED DURING MEETING]

We anticipate that there will be [NUMBER OF PEOPLE] people in our group. We view this as an opportunity to make the [REPRESENTATIVE/SENATOR] aware of the issues that affect my industry, clients, and your constituents.

Thank you for your assistance in scheduling this appointment with NAIFA representatives.

Sincerely,

[NAME]

[NAIFA CHAPTER AND TITLE]

 **About NAIFA:** Founded in 1890 as The National Association of Life Underwriters, the National Association of Insurance and Financial Advisors (NAIFA) is one of the nation’s oldest and largest associations representing the interests of insurance professionals from every Congressional district in the United States. NAIFA members assist consumers by focusing their practices on one or more of the following: life insurance and annuities, health insurance and employee benefits, multiline, and financial advising and investments. NAIFA’s mission is to advocate for a positive legislative and regulatory environment, enhance business and professional skills, and promote the ethical conduct of its members.

**Sample Thank You Letter**

Dear [SENATOR/REPRESENTATIVE]

On behalf of NAIFA-(state), I wish to thank you and your staff members for meeting with me and my colleagues on [DATE].

As a leader for insurance agents and financial advisors in [STATE/DISTRICT], I appreciated the opportunity to speak with you about how [CURRENT ISSUES] may impact my industry. As I mentioned, these issues affect my clients, America's consumers, and your constituents.

Please feel free to contact me if I can provide you or your staff with further information on insurance and financial services issues or the National Association of Insurance and Financial Advisors.

Sincerely,

[NAME]

[NAIFA CHAPTER AND TITLE]

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