



IN THE
DISTRICTS

TALKING POINTS

DATE

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, the National Association of Insurance and Financial Advisors is the leading association for financial service professionals in the United States of America. NAIFA members, in every Congressional district and every state house, subscribe to a strong Code of Ethics and represent a full spectrum of practice specialties to promote financial security for all Americans. Complimented by its professional development and consumer communities, the Society of Financial Service Professionals and Life Happens, the association delivers value through advocacy, service, and education.

TALKING POINTS

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.

To participate in September's Life Insurance Awareness month, here is a [link](#) to our consumer content with downloadable social graphics appropriate for you to share with your constituents as well as a digital copy of the [What You Need to Know](#) flyer.

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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