

## “Take Your Legislator to Work” Packet: Sample Letter/Email

1) Letter/Email

2) Talking Points

3) Phone Script

4) Press Release

The Honorable [full name]  
Address First Line  
Address Second Line  
City, State Zip

Dear [Lawmaker’s Title and Name]:

On behalf of [name of bank], I would like to invite you to visit us as part of the Wisconsin Bankers Association’s “Take Your Lawmaker to Work” initiative and learn more about how banks operate and the important role we play in the community you represent.

We believe that it’s important for us to take you behind the scenes and demonstrate our bank’s stake in the economic growth, health, and vitality of our community. We are not just there to help local families and businesses with all their milestone events, like buying a new car or first home, planning for college or retirement, or expanding a new business. We’re also creating jobs and participating in the civic life of our community. We’d like to discuss how public policy impacts our bank’s ability to serve our communities.

A visit to our bank would allow us to update you on our most recent initiatives here in [name of community].

We will follow up with your scheduler to set up a bank visit at your convenience. In the meantime, if you have questions, please contact me. I can be reached by e-mail or phone. My contact information is below. We look forward to hosting you in our bank.

Sincerely,

[Name and contact information for President/CEO, Chair of the Board, etc.]

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### WBA Legislative Update: First Bank of Wisconsin

State Senator Dave Craig (Republican)  
Wisconsin's 28th Senate District

#### Biography:

Dave Craig was elected to the state Assembly through a special election in May 2011 and then to the state Senate in 2016. Prior to his entering the legislature, Craig served as a Trustee for the Village of Big Bend. Outside of public office, he interned in Washington, D.C. before working as an aide to Congressman Paul Ryan for nine years while working part time as a realtor. In the Senate, Craig serves as Chairman of the Committee on Financial Services as well as a member of several other committees. He and his wife Amy make their home in the Town of Vernon, where they raise their five children.

## I. Current Market Analysis

MESSAGE: *Provide an overview of your current market and how it has changed over the last 18 months and what that means for a legislator.*

## II. State Issues

MESSAGE: *Thank Senator Craig for his work on swift passage of AB XX (see attached) in the Assembly and encourage state Senate to take action to get the bill to the Governor's Desk.*

### Elder Financial Abuse Package – Support

ISSUE: See attached documentation covering the following areas:

- Latest statistics on elder abuse
- New tools for financial institutions
- Tell a personal story from your bank!
- Importance of a liability shield and abuse of powers of attorney

## III. Federal Financial Regulatory Reform/Impact on Wisconsin's Banks

MESSAGE: *Please inform Representative Craig about the impact of the Federal government's regulatory actions and the effect of the totality of them on your bank. Examples could include increased compliance costs which are not easily absorbed by community banks. It could mean more consolidation within the industry and less competition.*

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### IV. Federal Issues

#### CANNABIS BANKING – SUPPORT SAFE BANKING ACT

Thirty-three states now permit some form of legal cannabis commerce, but cannabis is still a banned narcotic under federal law. Since banks potentially face criminal prosecution if they provide financial services to these businesses, their employees or service providers, few of these legal businesses have access to banking. Current federal laws are forcing this rapidly growing multibillion-dollar industry to operate on a cash only basis, which is creating a public safety issue.

#### BANK SECRECY ACT – SUPPORT THE ILLICIT CASH ACT, S. 2563

Congress can help banks be more effective fighting these crimes by updating the Bank Secrecy Act and anti-money laundering laws. The House has passed a bill that, among other things, would direct the Financial Crimes Enforcement Network to create a national database of businesses' beneficial ownership information and enhance communications between banks and law enforcement.

#### COMMUNITY REINVESTMENT ACT – SUPPORT REGULATORY CHANGES

WBA supports modernizing CRA and has urged regulators to: align CRA resources with actual community needs; reflect changes in technology, consumer preferences and the business of banking; increase certainty and transparency regarding regulatory interpretations and standards; improve the supervisory process; and apply CRA-like requirements to other financial firms, including credit unions.

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Please Note: WBA will provide you with custom talking points by request. Contact Mike Semmann at [msemmann@wisbank.com](mailto:msemmann@wisbank.com) or (608) 441-1206.

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*\*\* Please be sure to take a photo of the Representative's visit to your bank and send it to WBA's Eric Skrum at [eskrum@wisbank.com](mailto:eskrum@wisbank.com). The photo will be shared with the Representative as well as used to encourage other bankers to host similar events.*

## “Take Your Legislator to Work” Packet: Sample Phone Script

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### SAMPLE TAKE YOUR LEGISLATOR TO WORK PHONE SCRIPT

YOU: Hello, Elected Official's office. Hi, this is (Insert Name) and I live in (City). I'd like to speak to the staff person who schedules in-district meetings?

OFFICE: Hold on please while I check if that person is available. (pause)

OFFICE: I'm sorry, our scheduler isn't available right now. Can I take a message? Or Yes, please wait a moment.

OFFICE: Hello, ELECTED OFFICIAL'S SCHEDULER here.

YOU: Yes or Hi, and I'm from \_\_\_\_\_ bank. I'm hoping to schedule an in-district meeting with ELECTED OFFICIAL at our bank within the next few weeks.

#### Questions the staff person may ask at this point?

- OK, do you have any dates/times in mind?
- How long will the meeting last?
- Do you know who will be there? (How many constituents will attend?)
- Where would like to hold the meeting?
- Do you have an idea of the issues you'd like to discuss?
- Would you like the ELECTED OFFICIAL to prepare anything?
- Anything else we should know?

#### **Be prepared to answer the best you can, but you are not required to have every detail.**

- Thanks for your message. The STAFFER will get back to you soon.
- I'll have to get back to you to confirm, is there a best contact number?
- Hey, this will work. Let's pencil it in and I'll confirm in a few days.
- At that point, make sure to get the staffer's name and contact information.
- Last: Contact WBA and let them know when the meeting will be held. You are awesome.

**PRO-TIP: If you forget to ask for contact information, visit: [www.legis.wisconsin.gov](http://www.legis.wisconsin.gov) then click on either Senate or Assembly. Then click on the individual Senator or Assembly Rep. to get a list of staff names and individual email addresses.**

## “Take Your Legislator to Work” Packet: Sample Press Release

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### FOR IMMEDIATE RELEASE

Month Date, 2020

For more information,  
contact NAME, BANK, PHONE

### Lawmaker Visits XXX Bank through “Take Your Legislator to Work” *Senator XXXX Tours XXXX*

CITY – Elder financial abuse, data security, cannabis banking and economic development were just a few of the many topics discussed during state Senator XXXX’s recent visit to XXX Bank. XXX participated in the “Take Your Legislator to Work” program that helps lawmakers learn more about the banking industry by visiting a local bank.

Sen. XXX, who was reelected to the Senate last November, serves on the XXXX Committee. “I appreciated the time that the employees at XXX gave me. By learning more about their jobs, it makes me better at mine,” XXX said.

During the visit, Sen. XXX learned how day-to-day operations work at XXXX and had a chance to share with bank employees what has been happening at the State Capitol. XXX explained to the bankers his priorities on economic development and other legislation his office is currently working on.

Sen. XXX and bank staff also discussed banking issues such as taxes, non-bank financial institutions, Bank Secrecy Act, and the role that banks play in maintaining a strong local economy.

The legislator concluded the bank visit by meeting with bank employees and taking a turn at the teller window.

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