

“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 Legislator to Work” initiative. This is great way to learn more about how banks operate and the important role we play in the communities 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 help local families and businesses achieve milestone events such as buying a new car or first home, planning for college or retirement, or expanding a new business. Beyond that, we’re also creating jobs and participating in the civic life of our community. We’d like to discuss and show you how public policy impacts our bank’s ability to conduct these activities.

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: Horicon Bank

State Representative Mark Born
Wisconsin's 39th Assembly District
Republican
Co-chair, Joint Committee on Finance

Biography:

Mark Born was elected to the State Assembly in 2012 and has been re-elected since 2014. Prior to entering the Legislature, Born spent 15 years as a corrections supervisor at the Dodge County Sheriff's Department. He is a former member of the Beaver Dam Police and Fire Commission and the Beaver Dam City Council. In the Assembly, Born serves as Co-chair of the powerful Joint Committee on Finance, which oversees the state's finances and crafts the state budget every two years. He and his wife reside in Beaver Dam, where they raise their daughter.

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 Representative Born 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 Born 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

PAYMENT SYSTEM PROTECTION

The Federal Reserve Banks operate payment services, which serve as a backbone of payment system stability, instill confidence in economic transactions, and facilitate the America’s commerce. Congress has enacted laws to ensure the integrity of the payment system by providing for the supervision of banks as payment intermediaries and of banks’ affiliates as users of bank payment services that present unique risks.

New payment service providers and organizations offering new types of payment services are attempting to obtain direct access to the Federal Reserve Banks payment services. With direct access, these organizations would introduce risk to the payments system because they are not subject to the full federal supervision and regulation that generally applies to insured depository institutions.

Congress should protect consumers, financial institutions, and the payment system itself by clarifying that the Federal Reserve Banks are only authorized to provide master accounts to insured depository institutions, insured credit unions, and certain other entities authorized by law.

ENHANCING CREDIT OPPORTUNITIES IN RURAL AMERICA (ECORA)

The Enhancing Credit Opportunities in Rural America (ECORA) Act is farmer-friendly legislation designed to lower the cost of financing farm and ranch real estate. ECORA removes taxation on income derived from farm real estate loans made by FDIC-backed financial institutions. By eliminating this taxation, it will cost less for lenders to make these loans and then those savings can then be passed on to farm and ranch customers. Average interest rate reductions are estimated to be between 1.5% and 2%. Net farm income continues to trend downward; this legislation is a simple solution to increase income for farmers and ranchers.

Please Note: WBA will provide you with custom talking points by request. Contact John Cronin at jcronin@wisbank.com or 608-441-1215.

*** Please be sure to take a photo of the Representative’s visit to your bank and email it to WBA’s **John Cronin** at jcronin@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

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.

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

I'm sorry, our scheduler isn't available right now. Can I take a message?

Or

Yes, please wait a moment.

Hello, ELECTED OFFICIAL'S SCHEDULER here.

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 then click on either Senate or Assembly. Then click on the individual Senator or Assembly Representative 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, 2021

For more information,
contact NAME, BANK, PHONE

Lawmaker Visits XXX Bank through “Take Your Legislator to Work”

Senator XXXX Tours XXXX

CITY – Elder financial exploitation, data security, liability protections, 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 at the federal level, such as taxes, rural lending, protecting payment systems, and the role that banks play in maintaining a strong economy.

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

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