



# Legislator Meeting Planning Worksheet

*“You have to work things out in the cloakroom and when you’ve got them worked out you can debate a little before you vote.” Senator Lyndon Johnson*

## Legislator Background

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NAME

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PARTY

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COMMITTEE ASSIGNMENTS

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OTHER

*“Well, what do we do now?” George Bush to President-Elect Ronald Reagan, November 1980*

## Basic Logistics

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MEETING TIME

ROOM NUMBER

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ALL PARTICIPANTS (colleagues, as well as legislative staff)

*“Her ad-lib lines were well-rehearsed...” Rod Stewart*

## Scripting The Discussion

### ▲ Key Point 1

Agents are an important link between consumers and insurance companies.

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### ▲ Key Point 2

Agents “work for” consumers, not insurance companies.

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### ▲ Key Point 3

Licensing is important in two ways. 1) It provides a foundation for consumer protection. 2) It assures a level playing field in the fast-paced and rapidly changing financial services marketplace.

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