

The FINANCIAL PLANNING ASSOCIATION of California



Telephone Scripts

1. Advocacy Day (Sacramento) – first week of March each year
2. Advocacy Week (In District) – September when on recess

When calling your state elected officials there are a few do's and don'ts to an effective call.

- Be polite, upbeat
- Identify yourself as a constituent and state your name and address
- Thank whoever you are speaking with for their time.

1. Sacramento – Telephone script for making the appointment

Hello, my name is _____, and I am a constituent in (Assemblymember/Senator) _____'s district. May I please speak to the scheduler in your office? (*passed to Scheduler*)

Hello, my name is _____, and I am a constituent in (Assemblymember/Senator) _____'s district. I would like arrange an office meeting with the (Assemblymember/Senator) on March _____. Are there any appoints available?

(If asked the nature of the visit) I am a member of the Financial Planning Association. Our statewide chapter is having an Advocacy Day in Sacramento on March ___, and we would like to discuss the effective regulation of the financial planning profession, as well as other issues related to the financial services industry.

If asked for Talking Points to be emailed in advance of the meeting, we will have some prepared

2. In District Office Visit – Telephone script for making the appointment

Hello, my name is _____, and I am a constituent in (Assemblymember/Senator) _____'s district. May I please speak to the scheduler in your office? (*passed to Scheduler*)

Hello, my name is _____, and I am a constituent in (Assemblymember/Senator) _____'s district. I would like arrange an office meeting with the (Assemblymember/Senator) during the week of September (14) (*to be updated each year*). Are there any appoints available September ____? (*you pick the day that's best for you; have an alternate available*)

(If asked the nature of the visit) I am a member of the Financial Planning Association. Our statewide chapter is having an Advocacy Week in our legislator's district offices on March ___, and we would like to discuss the effective regulation of the financial planning profession, as well as other issues related to the financial services industry.

If asked for Talking Points to be emailed in advance of the meeting, we will have some prepared

The FINANCIAL PLANNING ASSOCIATION of California



Advocacy Week follow-up e-mail to Scheduler

(If appointment wasn't made during the phone call; otherwise delete this paragraph.) I called this morning and was told the best way to schedule an appointment is send you an e-mail. I am a constituent of *(Asm. or Senator)* _____. I would appreciate an appointment on *(Monday/ Tuesday/ Wednesday/ Thursday/ Friday)* September *(14, 15, 16, 17, 18)*.

The FINANCIAL PLANNING ASSOCIATION of California is having Advocacy Week during the week of September **14** where members from throughout the state will be meeting with our representatives in their district offices.

The FINANCIAL PLANNING ASSOCIATION is the professional membership organization for Certified Financial Planners with over 3,000 members in the State of California and approximately 24,000 nationwide. Our *(chapter name)* chapter is particularly strong and active!

The purpose of the meeting is to familiarize the *(Assemblymember/Senator)* with the Financial Planning Association, inform *(her/him)* that we are a resource for community activities in *(her/his)* district (e.g., pro bono financial planning), and offer to be a resource as to potential legislation affecting the financial services industry, including effective consumer protection.

(If appointment wasn't made during the phone call; otherwise delete this paragraph.) I would appreciate your prompt attention to this matter, as I am a volunteer/leader with the FINANCIAL PLANNING ASSOCIATION and I am scheduling for one or two other constituents who are members of The FINANCIAL PLANNING ASSOCIATION who would likewise be attending this meeting.

I am looking forward to our meeting. Thanks you for your assistance.