

2017 NSSTA
“TAKE THE HILL DAY”
March 7, 2017

OVERVIEW:

On Tuesday, March 7, 2017, NSSTA members are going to be invited to spend the afternoon on Capitol Hill - meeting with Members of Congress and senior Congressional staff. On this day NSSTA members will “Take the Hill” to meet Members of Congress and highlight the important public policy and economic security benefits of structured settlements.

On Tuesday evening, March 7, all NSSTA members will be invited to participate in the AAPD Leadership Gala

This packet has been prepared to guide NSSTA members on:

1. How to contact Members of Congress
2. How to schedule meetings on Capitol Hill
3. How to best “lobby” Congress on behalf of the structured settlements industry.

The NSSTA Association Management Team and the NSSTA Director of Government Affairs will be available to assist your Congressional outreach efforts, but everything starts with you.

You will find attached the following:

- Information that will guide you as you contact your Member of Congress to schedule a meeting on Capitol Hill
- “Helpful Hints” on what to do and what to say to Members of Congress and senior Congressional staff
- The Agenda for the “Take the Hill Day”
- A “Draft” letter for your use to send to Members on Congress—to schedule a meeting.

HOW TO CONTACT YOUR MEMBER OF CONGRESS

The following steps should help you make initial contact with Congressional staff, prepare the meeting request memo and follow-up with Congressional staff to secure your meeting on Capitol Hill or the Congressional District Office with your Member of Congress.

1. Identify your Members of Congress: You are represented in Washington, D.C. by three Members of Congress—two U.S. Senators and one Member of the U.S. House of Representatives.

- The easiest way to identify your Congressional Representative and your Senators is to go on-line to the web site of the U.S. House of Representatives, www.house.gov and the U.S. Senate www.senate.gov. In both cases, you can insert your Zip Code and find your Member of Congress.
2. **Information You Need:** There are several pieces of information you need from the House of Representatives and U.S. Senate websites, including:
 - The correct spelling of the Member’s name
 - Congressional Office Address on Capitol Hill
 - Congressional Office Phone Number
 - Name of the Member’s Scheduler and Member’s Chief of Staff
 - District Office Address and Phone Number
 - District Office Staff Director
 3. **Congressional Offices—Washington, D.C. vs. District Offices:** Members of Congress typically have two or more local (District) offices located in their Congressional District—which could be in your home town, and an office in Washington D.C. Unless you already know your Member of Congress and have met with senior Congressional Staff, make your first contact with your Member of Congress in their District Office.
 4. **Call the Congressional District Office:** Because you visited the Member’s web site you know the name of the District Staff Director for the Member. You are calling to introduce yourself, introduce your company and your trade association—NSSTA. You are also calling to inform the staff that you plan to be in Washington, D.C. for the NSSTA “Take the Hill” event on March 7, and you want to arrange a time to meet with Congressman X when you are in Washington. You need to know who in the Member’s Office on Capitol Hill you need to speak with to schedule this meeting.
 5. **Call the Congressional Office on Capitol Hill:** Most Members of Congress have a full-time Scheduler on their staff. As soon as you know you are planning to attend the NSSTA “Take the Hill” event, you need to contact the Congressional Office Scheduler—first with a phone call, then an e-mail *and most importantly, a fax request for a meeting.*
 6. **Meeting Request:** Members of Congress and their staffs meet with thousands of people every year. Your request for a meeting with your Member of Congress should include the following:
 - Clear statement of the facts—who are you, who do you work for and what are you doing in Washington, D.C.

- Clear Request--you are asking for time to introduce yourself, your company and structured settlements to the Member of Congress
- Clear Contact Information for you—office phone, cell number, office address
- Clear Dates and Times—when are you available to meet with the Member—be as flexible as possible
- NOTE: Be Professional and Be Positive: Congressional staffers are generally very positive when dealing with constituents and very serious about working with constituents to schedule meetings with the Member of Congress and/or senior staff
- Make your initial contact with the Congressional staff yourself. Do not ask your secretary or staff assistant to contact Congressional staff to schedule your meeting with the Congressman or Senator

GENERAL INFORMATION:

- Capitol Hill Phone Number Switchboard: 202-224-3121
- E-mail House Members: www.house.gov/writerep
- E-mail Senate Offices: www.senate.gov

AGENDA
“TAKE THE HILL DAY”
TUESDAY, MARCH 7, 2017

12:00 Noon: Arrive at the Capitol Hill Club, located at 300 C Street, SE, for a lunch meeting with Congressman Pat Tiberi, R-Ohio

1:00 PM: Arrive at the Rayburn House Office Building, located at Independence Avenue and South Capitol Street, SW. We are meeting in the Rayburn House Office Building Cafeteria, located on the Basement Level. *Building Security: You do not need an ID to enter the Rayburn House Office building, but you do need to pass through security. You will not be allowed to carry coffee, drinks or metal objects. You will pass through airport-like magnetometers*

1:30 PM: Staff Directors from Congressman Jim Sensenbrenner’s Office and Congressman John Lewis’ Office will greet NSSTA industry leaders and provide an overview of the major issues Congress plans to address during this first Session of the 115th Congress.

1:45 PM: NSSTA Staff will provide guidance and direction on meetings with Members of Congress

- NSSTA members will locate the offices of all three Members of Congress who represent them on Capitol Hill.
- NSSTA members will seek to meet with the Members of Congress and/or Congressional Staff.
- NSSTA members will share information about structured settlements and invite the Members of Congress to attend the 2017 AAPD Gala at the Washington Hilton Hotel that evening.
- You will receive invitations to the AAPD Gala that you will be able to hand out.

6:00 PM: NSSTA Leaders should plan to arrive at the Washington Hilton Hotel for the 2017 AAPD Gala Reception and Awards Dinner

9:00 PM: Post AAPD Gala Reception at the Washington Hilton Hotel.

HELPFUL HINTS ON MAKING YOUR MEETING WITH A MEMBER OF CONGRESS SUCCESSFUL

1. The Meeting: Here are just a few helpful hints:
 - Be on time—allow 30 minutes to get to the meeting, which includes getting through security.
 - Be prepared and be brief--you will typically have no more than 10-15 minutes with a Member of Congress. Do not assume your Member of Congress has an understanding of structured settlements.
 - Be clear--provide general information about you and your company and personal data or real-life structured settlement case story for illustration.
 - Be polite--Members of Congress and Congressional staffers are both very important to the legislative process—issues advocacy is all about building and maintaining relationships over time.
 - Be apolitical—a structured settlement is not a political issue, not a Republican issue and not a Democratic issue.
 - Listen carefully--Questions or comments about structured settlements should be noted and addressed.
 - Business Cards--Leave your business card with the Congressman and his/her staff assistant and, most importantly, get a business card from the Congressional staffer in your meeting
2. Political Campaign Information: NEVER, NEVER, NEVER discuss political campaign contributions or political fundraising events EVER in a Congressional Office with any Member of Congress or any Congressional Staffer--EVER.

STRUCTURED SETTLEMENTS—BACKGROUND INFORMATION

Structured Settlements Have Been Provided to Injured Persons in Many Well-Known Cases:

- 9/11 Victims of Terrorism at the World Trade Center and the Pentagon.
- Firestone Tires
- Vaccine Injuries
- Hyatt Hotel Collapse
- Challenger
- Pride of Baltimore
- Federal Civilian and Military Tort Claims
- Workers' Compensation

Structured Settlements Enable Injured Victims to Live with Dignity, Free of Reliance on Government Assistance:

- Structured Settlements provide private sector funding alternatives to taxpayer financed assistance programs to meet ongoing, long-term medical and basic living needs of seriously injured victims and their families, through an assured stream of payments tailored to victim's and family needs for a lifetime.
- Structured Settlements enable seriously injured, often profoundly disabled people to live with dignity and financial independence, free of reliance on government programs.
- Structured Settlements enjoy strong support from the Plaintiff's Bar, the Defense Bar Judges and Mediators.

Congressional Support for Structured Settlements:

The U.S. Congress has adopted a series of special tax rules to encourage the use of structured settlements to provide long-term financial security to injured victims and their families that have worked well for 30 years.

Under these structured settlement tax rules, the full amount of the periodic payments constitutes tax free damages to the victim and that the liability to make the periodic payments to the victim may be assigned to a structured settlement assignment company that will use a financially secure annuity to fund the damage payments (I.R.C. § 130, 104,72).

In 1997, Congress passed the "Taxpayer Relief Act of 1997" with bipartisan support—Congressman Pete Stark and Congressman Jim Ramstad in the House Ways and Means Committee and Senator Max Baucus and Senator Chuck Grassley in the Senate Finance Committee—to extend the structured settlement tax rules to workers' compensation to cover physical injuries suffered in the workplace.

In 2001, Congress passed the “Victims of Terrorism Tax Relief Act of 2001” which included the “Structured Settlements Protection Act which protects structured settlement recipients from factoring companies trying to purchase part or all of the injured victim’s future payments in exchange for a sharply discounted lump sum payment. These factoring transactions jeopardize the long-term financial security of injured victims and their families.

Key Members of Congress Who Support Structured Settlements and Who Have Spoken at Recent National Structured Settlements Trade Association Conferences and Meeting:

- Congressman Kevin Brady, R-Texas
- Congressman Pat Tiberi, R-Ohio
- Senator Orrin Hatch, R-Utah
- Senator Chuck Grassley, R-Iowa
- Senator Dick Durbin, D-Illinois
- Congressman Devin Nunes, R-California
- Congressman Sander Levin, D-Michigan
- Congressman Peter Roskam, R-Illinois
- Congressman John Lewis, D-Georgia
- Congressman Joe Crowley, D-New York
- Senator Dean Heller, R-Nevada
- Congressman Jim Sensenbrenner, R-Wisconsin
- Congressman Richard Neal, D-Massachusetts
- Senator Michael Bennet, D-Colorado
- Senator John Thune, R-South Dakota