

Feb. 7, 2020

TO: Attendees of The Council's 2020 Legislative & Working Groups Summit
FROM: Joel Wood, Senior Vice President, Government Affairs
RE: Overview of Legislative Issues, Program and our Agenda on the Hill

Impeachment trial, check. State of the Union speech-ripping, check. Bitter polarization in a presidential election year, check. What a time for you to come to Washington!

I've been lobbying for The Council for more than 27 years now, and this is the most unusual and wearisome environment I've ever seen. Typical, though, of presidential election years, the opportunity to move the dial on issues of concern to commercial insurance brokerages is more about a posture for the next Congress. We do have issues, however, we hope and expect will reach the finish line in this session of Congress, notwithstanding the calcification of Congress on many big-picture issues.

We are thus delighted that you will be participating in our association's 2020 Legislative & Working Groups Summit, where we have a record attendance. Because we have many meetings and subjects that are going to be covered, we've been sending you a lot of material, and hope that you will be able to digest as much as possible in advance of the meetings.

This document is the overview of the legislative portion of the meeting. It is our hope that this document will answer many of your questions, particularly if you are a first-time attendee. If you're participating in any part of the legislative program, **PLEASE** read this!

FIRST UP – Birds on Badges!

There are upward of 70 insurance trade associations (and probably 75 or more insurance companies) that have some direct lobbying presence in Washington. Due to the generosity of our member executives, and reflective of their civic engagement and power, **The Council's political action committee raised \$3 million during the last two-year election cycle – the largest among all the insurance organizations.** PAC dollars are the "hard" political dollars (as opposed to "soft" or "super-PAC" dollars) that directly go to the campaigns of candidates. It's the money the candidates themselves control; it comes from the personal pocketbooks of contributors, and thus is the most valuable. **One of our goals for this LWGS is to significantly increase the number of participants in our political program.** Our Board of Directors has set an ambitious goal of raising \$2 million for CouncilPAC this year, and we appreciate everyone's willingness to help achieve that goal. Please get a bird on your badge by making a contribution to CouncilPAC and/or contact our CouncilPAC Manager, Gracie Gerlach at Gracie.Gerlach@ciab.com.

Thank you!

NEXT – Really Important Stuff: Congressional Appointments

Let's cut to the most critical part of our program, the raison d'être of the Legislative Summit: your visits to congressional offices on Wednesday. My colleague, Blaire Bartlett (as in Blair.Bartlett@ciab.com) has worked countless hours in the past month to arrange as many high-quality meetings with Members of Congress and their staffs as possible.

You should have our event app on your phone called CrowdCompass AttendeeHub. If you have not downloaded the app yet, please see here for instructions, or we can help you download it when you check in at the hotel. If you signed up for congressional meetings, your appointments will appear in the app, but you will also get a hard copy of your meeting schedule on Wednesday morning at the start of the breakfast in Room 325 of the Russell Senate Office Building (the Kennedy Caucus Room). **Make sure to accept notifications from the app,** because nothing is set in stone, and these push notifications will tell you if a meeting has changed. If the schedule changes on your end, please email or call Blaire at 202.821.2190 (she's also a pretty proficient texter!).

The Council is known for its 107-year tradition of networking meetings that bring together the most influential executives of the commercial insurance brokerage world. Those meetings traditionally are highly structured and pre-planned. Because of the vagaries of the congressional schedule and the ebb and flow of specific issues of interest to our member firms, the Legislative Summit is different, and much by necessity comes together at the last minute. Wherever possible, we have grouped together visits with congressional offices by geography, and, in some instances, by issue group. We have strived to have as many sit-down meetings directly with relevant Members of Congress. Where the Member is unavailable, we have tried to arrange for the relevant legislative staffer(s) for that representative or senator to meet with our delegations.

In many instances, meetings with congressional staff can be more relevant and productive than meetings with the Members themselves, who are deluged with hour-by-hour stimuli from all directions. Inevitably, some of our participants will have quality meetings with ranking Members of Congress who will have significant influence over the issues that concern us. And just as inevitably, some of our participants will wind up talking to a very junior staffer who stares at them blankly. In all, our goal, like a Jackson Pollock painting, is to sling as much stuff up against the congressional canvas and (hopefully) turn it into a collector's item/success. In any event, **we need your feedback after the meeting so we can follow up directly with the Members and their staff and connect the dots.** Please address your de-brief to any of us on the government affairs team, including me (Joel.Wood@ciab.com), Blaire, and/or the "other" Joel (Joel.Kopperud@ciab.com).

WHAT TO TALK ABOUT IN THE HILL MEETINGS?

What points you make in your meetings is somewhat less important than the fact that you are there to begin with. **Much of the support or success that we enjoy long-term with congressional actions is a reflection of the fact that we are present in the debate on an ongoing basis.** (As we say with the PAC, "if you're not at the table, you're on the menu.")

Please feel free to focus on the issues where you are most comfortable and knowledgeable. Feel free to share our one-page issue briefs, but don't feel any particular need to stick to any particular script. Score your points, and let us do the follow-through after the meetings.

Every year we have specific "asks." But the first item we would recommend for each congressional appointment is not an ask, but rather a "thank you." In the end-of-year federal funding bill last December, Congress passed a number of items that we had been requesting, including a seven-year extension of the Terrorism Risk Insurance Act (TRIA), elimination of the Cadillac Tax on high-cost health plans, and elimination of the Health Insurance Tax. This legislation was approved in both chambers on an overwhelming bipartisan basis (something you seldom hear about on the news). We hope that you can convey our appreciation.

THE PROGRAM AND THE CONGRESSIONAL CALENDAR

We've responded this year to Board requests to collapse our meeting schedule as tightly as possible. This means that we are doing our Congressional Reception on Tuesday night, the Legislative Program with Hill speakers on Wednesday morning, and the program concluding with your Hill visits – thus it is critical that we hear back from you on each of your meetings so we can follow up.

Our Tuesday reception is 5:30 to 7:30 p.m. in the Montpelier Room of the Madison Building of the Library of Congress. We've invited many policymakers and staff and as this is a reception without a formal program, there will be a lot of people wandering around looking to make connections with our participants from their districts or states. We expect strong turnout from Members of Congress and party leaders. Please have a good time, but also try to facilitate as many of those connections as you can!

THE CONGRESSIONAL PROGRAM ON WEDNESDAY

Buses are going to roll from the Mandarin Oriental to the Hill promptly at 7:15 a.m. on Wednesday. Security is always an issue on the Hill, and sometimes there's a backup in the lines, so please try to do everything you can to be in your seats by 8:00 a.m., as we have much ground to cover. **Our program is being held in the Kennedy Caucus Room of the Russell Senate Office Building – one of the grandest and most historic rooms in our nation's capital.** For the past 80+ years, the Caucus Room has served as a stage for some of the most dramatic Senate investigations such as the sinking of the Titanic, the Teapot Dome scandal, Pearl Harbor, the Kefauver Crime Committee, the Army vs. McCarthy, the Vietnam War, Watergate and Iran-Contra.

Our schedule on Wednesday will be presided over by Council Chairman David Becker, CEO of Cottingham & Butler.

We continue to adjust our lineup of speakers based on availability, but so far our lineup includes some very strong and compelling speakers, including **Senator Susan Collins of Maine, Rep. Donna Shalala of Florida, Rep. Ed Perlmutter of Colorado, and political commentator Charlie Cook of the Cook Political Report.** Again, things can change! By Monday, we hope to have the entire schedule available.

EXECUTIVE SUMMARY OF THE ISSUES

We have three issue briefs we would like for each of our participants to leave behind in congressional offices. These briefs are reflective of important public policy issues that are either on the congressional agenda or we want to be on the congressional agenda. We believe that they are self-explanatory, and we urge you to closely review these issue briefs that are linked below. They include:

- ▶ [Underscoring the importance of employer-based health insurance](#)
- ▶ [Support for measures to increase healthcare cost transparency](#)
- ▶ [Support for the "Safe Banking Act" to allow financial services to be legally provided to the cannabis industry.](#)

FINALLY...

We, again, are so grateful that you are making the sacrifice of coming to Washington to exercise one of the most fundamental of constitutional rights – the petition of government for redress of grievances. Just as our political action committee is the biggest among all of the insurance trades, we believe our interests have steadily climbed the ladder of congressional attention, and our successes outweigh our setbacks. All of us on The Council's staff will be available to help you make the most of the coming days. We also hope that you benefit from the comradery of being with other commercial insurance executives in a format that is more intimate than our large meetings.

Safe travels!



Joel Wood

Senior Vice President, Government Affairs