

Meeting with your MP: A Five-Step Interview Track

1. Explain what CALU is (i.e.; an organization of life insurance and financial advisors who have made a commitment to pursue 'advanced' professional development, to be involved in the political life of their communities, and to work with Canadians, their families and their businesses, to ensure they develop a sound financial plan, which includes, and addresses, their health, retirement, succession and estate needs.)
2. Ask what the MP is hearing from his or her constituents in terms of the major issues on the horizon, and how you, as a CALU member, might be of assistance in providing further information or commentary about these issues. Remember the importance of demonstrating your listening skills as well as your presentation skills in order to achieve the relationship-building objective of the meeting.
3. If not raised in the above discussion point, remind the MP about your and CALU's particular interest in issues concerning health care, retirement planning, personal taxation, small business continuity and long term care, and ask how you might help the MP explore these issues more fully.
4. Ask how best to stay in touch with the MP and maintain communications in the coming year. Understand that it is quite common for the MP to suggest a staff person from his or her office ensure your coordinates are received and that you are kept in their active communication database.
5. In closing, Thank the MP for his or her time, and remind the MP that CALU holds its annual meeting in Ottawa each May (given its interest in political and public policy issues) and that you would hope to be able to meet briefly while in town, and that he or she will be your guest at the CALU Parliamentary Reception.



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