

AzBA PAC

Political Action Committee for the Arizona Banking Industry



President/CEO Tool Kit

It's PAC fundraising season and we're challenging every banker to be **Invested in AzBA**. The association provides relentless advocacy through lobbying at the state and federal level. An important foundation for this work starts at the grassroots level to continue to support campaigns that support the interests of community banking in Arizona. We could not accomplish all that we do without the grassroots foundational support.

AzBA PAC represents the single, unified political voice of Arizona's banks, combining large and small contributions from bankers across the state and allocating those contributions to candidates who support pro-banking and pro-business policies that move Arizona forward, regardless of party affiliation.

Arizona bankers depend on lawmakers who support pro-growth, continued de-regulatory policies and the banking industry needs to actively support those candidates. AzBA PAC contributions help give these candidates the opportunity to get their message heard over the noise created by fringe political groups who promote candidates that cast a negative light on our state.

AzBA offers three ways for you to **support the AzBA PAC Campaign**:

Run an AzBA PAC Campaign – Enclosed is everything you'll need to guide you through a successful campaign. Ask directors, officers and staff at all levels to contribute to AzBA PAC. Any amount helps and the need for political advocacy from the banking industry has never been more apparent than it is today. ***With On-Line Donations – contributing has never been easier.***

Executive Pledge – **Bank presidents & CEOs, use this option.** Pledges allow AzBA the flexibility to present personal checks in support of candidates who, due to state statutory PAC limitations, can no longer receive funds from PAC accounts.

Put PAC on the Agenda - AzBA President & CEO, Paul Hickman, is currently scheduling visits at member banks to make a presentation before bank Boards or employees to highlight Arizona's political landscape and explain the value of PAC. Email PAC@azbankers.org to notify AzBA of your next Board meeting.

Sample Kick-Off Script

Today we're going to kick off our 2019-2020 PAC campaign for the Arizona Bankers Association. As most of you know, the Association lobbies on behalf of the Arizona banking industry at local City Halls, the State Capitol and in Washington D.C.

Advocacy is a three-legged stool – lobbying (done by our Association), grassroots (done by all of us) and funding for political contributions. Each is less effective without the others.

The great thing about a PAC – Political Action Committee – is that it allows many people to combine small contributions to make a big impact.

The PAC supports candidates that support business, economic growth and banking principles, and does not toe a party line.

We can provide support for the most positive trajectory for community banking in Arizona, since 2008, if we **speak with our votes, our communications and our checkbooks**. If we don't provide support for our industry, for our careers, no one else will.

The great thing about PAC fundraising is that every little bit counts. Contributions to the PAC are entirely voluntary, but I'm committed to our industry and to making sure that our bank does its part. I have already made a pledge in the amount of \$__.

My goal is to.....(a couple of suggestions)

- Achieve 100% participation by all employees and directors, no matter the amount of each contribution.
- Reach our target goal of \$_____.
- Raise more than we did last year.
-

If we reach our goal then (a couple of suggestions)

- We'll have a jeans day.
- I'll buy pizza for everyone.
- I'll shave my head (ok, maybe that's a stretch).

I am going to give each of you a contribution form. Look at it and consider contributing. Maybe \$25. That's \$1 a pay period and one extra for good measure. Do what you feel comfortable with and please return the form and your contribution

to_____by_____.

It's never been more important for our industry to engage and that starts with all of you. Thank you for all you do here at the bank and for being examples of the best part of our industry.



Executive Pledge Form

ARIZONA BANKERS ASSOCIATION Executive Pledge

Name: _____ Title: _____

Organization: _____ City: _____

Home Address: _____ Zip: _____

Email Address: _____

Legislative District (home): _____ Congressional District: _____

___\$100 ___\$250 ___\$500 Other \$_____

*Feel free to contribute more or less than the suggested amounts.
This is a commitment to a future contribution, send no money now.*

Do you have a party preference? R D Anyone pro-banking

Are you willing to attend fundraisers in your area? Yes No

How a pledge works:

- Send no money now – you are simply pledging to give money to a candidate in the future. You will be contacted by AzBA when a pro-banking candidate needs funds, and you'll be asked to write a personal check at that time.
- After you have written checks equal to the amount pledged, you will not be solicited for additional contributions.
- This money will not be deposited into the AzBA PAC.
- Checks will be written by you to a specific candidate's campaign account.
- All rules governing individual contributions apply.
- No individual may contribute more than \$424 per election cycle to any one state candidate or \$2,500 per cycle to any one federal candidate.
- All pledges count towards your bank's overall goal, so there is no downside to doing a pledge rather than a PAC contribution.

Political contributions are not tax deductible. You have the right to refuse to contribute.

Payroll Deduction & Monthly Auto Payment

Why Payroll Deduction?

There are several benefits to payroll deduction:

- **It makes contributing to the PAC accessible to every employee.** A dollar per pay period may seem like little to most people, but in the aggregate, it will yield big dollars for the PAC. It also gives more people the opportunity to contribute which will also increase your yield.
- **For senior execs who give more significant amounts, it allows them to spread that out over the year.** Many senior bank officers will write a \$200 check now, but over a year that would only be about \$8 a pay period. And, if they gave just \$25 per pay period their contribution would be \$600-650 a year and they'd hardly notice a difference.
- **More PAC contributors translate into better grassroots.** All bank employees, of all levels, want to be part of something. This allows them to do that. It also gets them invested in policy issues and will strengthen our grassroots network when it needs to be engaged.
- **Payroll deduction raises more money.** Payroll deduction programs have been highly successful for PAC fundraising. The hardest part is deciding to do it.
- **It gives community banks the same opportunity as large banks to engage their team.** This program is not for banks that already have their own internal campaign, but those campaigns are proof that payroll deduction works! Now, every bank can offer payroll deduction and give employees a cost effective and manageable way to get involved.

Payroll deduction can be implemented in four easy steps:

- **Notify the employees.** Send an email or letter to every employee explaining the PAC and giving them an opportunity to participate on a voluntary basis (sample attached). I don't recommend doing this more than once per year.
- **Collect authorization forms.** Along with the letter, employees will get a short form to authorize a deduction and set the amount, either one-time or per pay period (sample attached).
- **Assign a deduction code.** Your bank would assign a deduction code to the contributions, as you would with medical, dental, 401k. The amounts designated by employees on their authorization card are entered under the code you created.
- **Send AzBA PAC the money.** Bundled contributions can be sent by ACH to our PAC account, or the bank can send a check. If an employee wants to discontinue contributing at any time, they need only communicate that to your administrator in writing.

What is Monthly Auto Payment Through AzBA?

Amount

\$500	\$250	\$100
\$50	\$25	\$10

Other Amount

Monthly Donation

I would like to donate this amount every month

Use the On-Line Donation page to sign up for a monthly payment to AzBA.

Donate On-Line: <https://azbankers.org/pac>

LETTER TO BANK EMPLOYEES ELIGIBLE FOR BANKPAC SOLICITATION

To: Solicitable Employees
From: Chief Executive Officer
Re: AzBA PAC Fundraising Campaign

Today we are kicking off the AzBA PAC Fundraising campaign in our bank. I hope that everyone will take part in this important program. I made my personal contribution and hope you will do the same.

AzBA PAC is the bipartisan political action committee of the Arizona Bankers Association – *the voice* for Arizona’s banks. It supports the campaigns of candidates for the U.S. Senate and House of Representatives who advocate for a free and competitive financial marketplace. I am contributing because I count on AzBA PAC to support legislators across the country who have a positive effect on our bank’s future.

I am asking for your personal contribution because AzBA PAC’s strength lies in the involvement of Arizona’s bank professionals like you and me. By joining with bankers who have already made a personal commitment to AzBA PAC, we will make the voice of the banking industry in Congress even stronger.

Rather than making your contribution all at once, you now have the option of having a small contribution deducted from each of your payroll checks throughout the year. For example, a \$1 contribution per pay period would amount to a \$24 contribution, and a \$5 contribution per pay period would amount to \$120 a year. Traditional contributions by check are still accepted.

To contribute to AzBA PAC through an automatic payroll deduction, please complete the AzBA PAC contribution card attached and select the payroll deduction option and choose the amount you wish to contribute. This amount will be deducted from each pay check regularly and sent to AzBA PAC. To make a one-time check contribution, simply make a check payable to “AzBA PAC” and mail it to the address shown on the contribution card.

It’s never been more important for our industry to engage and that starts with all of you. Thank you for all you do here at the bank and for being examples of the best part of our industry.

Sincerely,

Bank President & CEO

Contributions to the PAC will be used in connection with federal elections and are subject to the prohibitions and limitations of the Federal Election Campaign Act. It is your right to refuse to contribute without fear of reprisal. Contributions to the PAC are not tax deductible. Federal law requires the PAC to use its best efforts to collect and report the name, mailing address, occupation and name of employer for each individual whose contributions exceed \$200 in a calendar year.

Implementing Payroll Deduction in Your Bank

Instructions for the Payroll Staff

- Your bank is permitted to use payroll deduction to collect contributions for **AzBA PAC** from the corporation's Solicitable personnel.
- Assign a deduction code to **AzBA PAC** contributions as you would **with any other deduction, i.e. Medical, Dental, 401k, etc.** Contributions to **AzBA PAC** do not qualify as pre-tax deductions. Once the deduction code has been assigned, enter in the amount being contributed per pay-period.
- For those employees that choose to participate in **AzBA PAC** through payroll deduction please send an initial list of contributors, as well the following information: name, address, employer, contributor's title, date of contribution and amount to **AzBA PAC**. (Subsequent deductions need only include name and amount.)
- Your bank's payroll deduction contact should send deductions for **AzBA PAC** contributions from employees' payroll in aggregate by ACH, wire transfer to **AzBA PAC's** account, or a check bundling the deductions, within 10 days of the pay period, to the address listed below...

111 W. Monroe, Suite 440, Phoenix 85003
Account#: 00001711373
Routing #: 122101706

- Any employee who wishes to discontinue his/her payroll deduction contribution to **AzBA PAC** must provide a written statement to your payroll deduction staff otherwise the contribution should be deducted regularly from the employee's pay check.