Legacy & Estate Quiz

Implementation & “Why” Guide

MAGELLAN
FINANCIAL

Legacy & Estate Planning Readiness Quiz

Turn legacy conversations into lasting relationships

CREATED BY MAGELLAN FINANCIAL – INTERNAL ADVISOR IMPLEMENTATION RESOURCE

What It Is

A quick, 15-question quiz designed to make prospects consider how ready they are to safeguard their family, assets, and wishes. Participants respond to true/false questions covering topics such as wills, trusts, healthcare directives, and taxes. Each response is scored.

SCORE RANGE	READINESS LEVEL	DESCRIPTION
0–14	**Low**	Minimal or no estate planning completed
15–24	**Moderate**	Some planning in place, but gaps exist
25+	**High**	Comprehensive plan with proactive strategies

Why It Works

- Estate planning is emotional; everyone seeks peace of mind, but few know how to begin.
- The quiz raises awareness, creates urgency, and establishes you as the trusted guide.
- It turns curiosity into conversations that can lead to meaningful planning engagements.

Ways To Use It

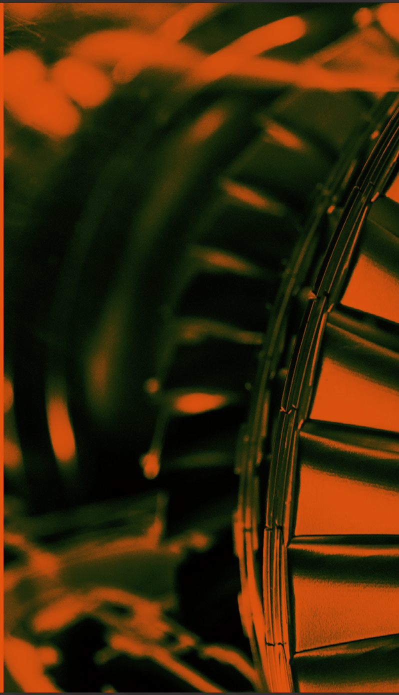
TV CTA: “Do you know if your estate plan is complete? Find out with our free 3 minute Legacy Readiness Quiz by scanning the QR code on the screen or going to [DOMAIN NAME].”

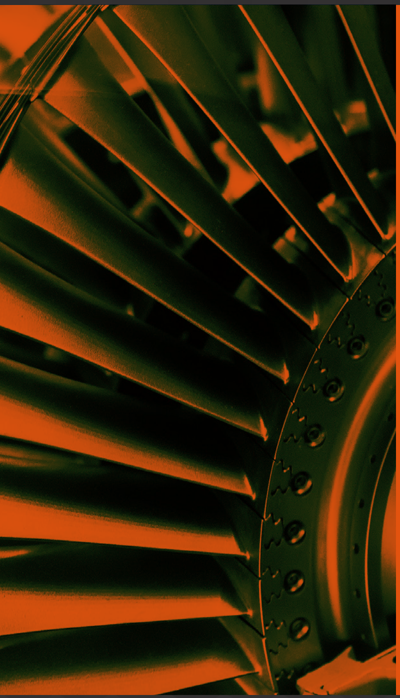
RADIO CTA: “Many Americans do not have a complete estate plan. Take our free 3 minute Legacy Readiness Quiz at [DOMAIN NAME].”

DIGITAL/SOCIAL MEDIA: Use strong, empathetic messaging: *“Your legacy deserves clarity. Take the quiz today.”*

WORKSHOPS/LIVE EVENTS: Invite guests to take the quiz before attending estate planning or tax workshops.

CLIENT REVIEWS: Have long-term clients retake the quiz periodically to keep plans up to date.





Conversation Starters

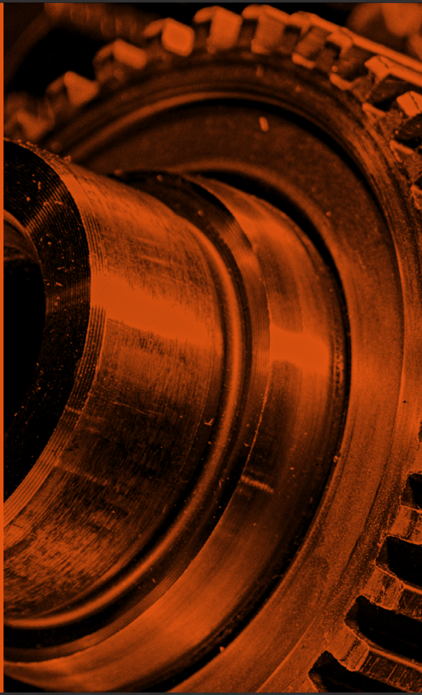
"Most people don't realize how many details are missing from their estate plan."

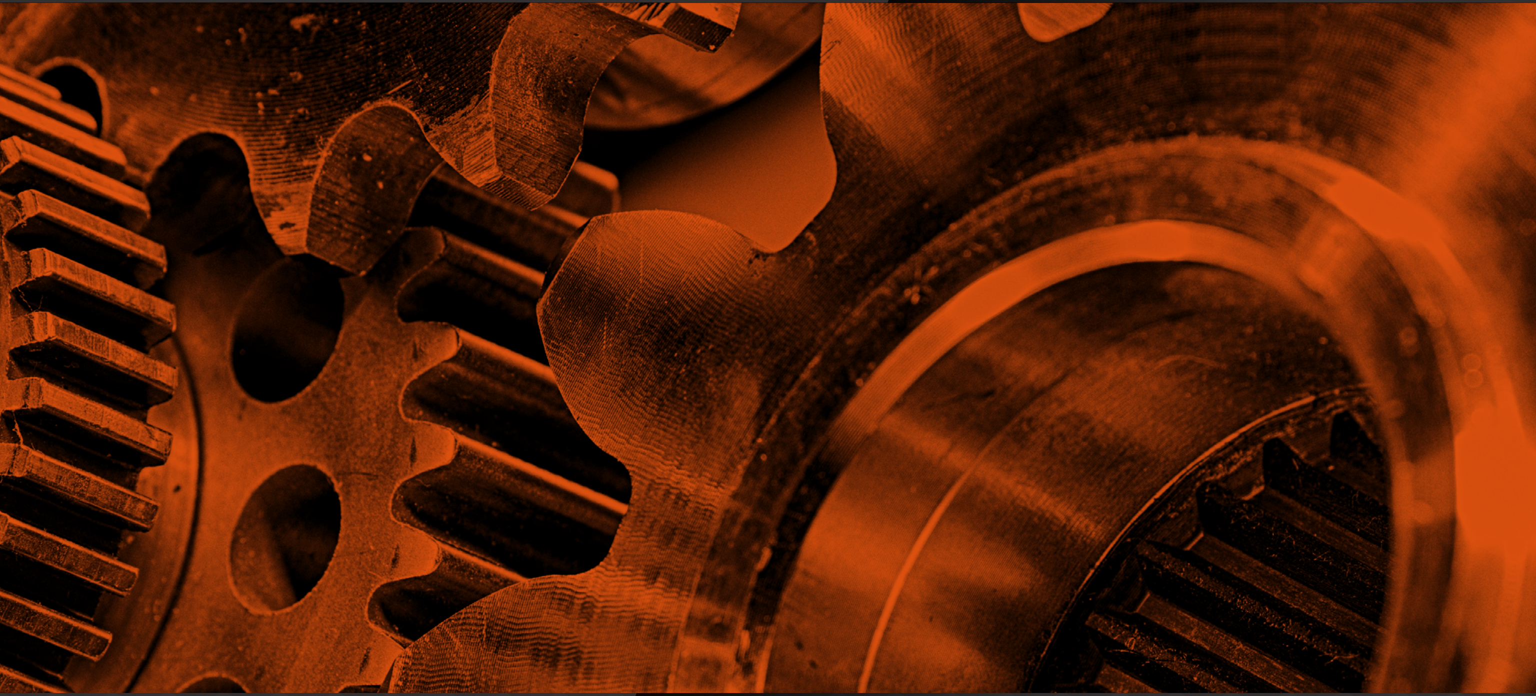
"Would your loved ones know exactly what to do if something happened to you?"

"Let's review your quiz results and pinpoint areas that might need attention."

Advisor Best Practices

- Follow up promptly after a new quiz submission; timing demonstrates attentiveness.
- Add each contact to your drip campaigns or nurturing sequences to foster familiarity and trust.
- Share pertinent educational content about estate updates, trusts, or changes in tax law.
- **Remember:** these are relationship-building leads, not instant conversions. Long-term communication pays off when clients go through major life changes that make them ready to act.





Lead Follow-Up Strategy

Contact new leads within 24–48 hours to thank them and offer to review their results. Follow up consistently through automated or personal touchpoints.

Think of these leads as a long-term, continuous engagement through helpful resources that will keep your name top of mind when they're ready to finalize or update their plan.

Access & Personalization

Each practice's quiz features your firm's name, logo, and disclosures to ensure a consistent, professional experience. A short, branded domain (e.g., MagellanLegacyQuiz.com) links directly to the quiz, making it easy to mention on air, in print, or online.

All results are entered into a dedicated Google Spreadsheet, where you and your team can view, track, and manage leads, responses, and scores.

Example Of Quiz Process And Materials

Introduction Page And Summary Of The Quiz


MAGELLAN
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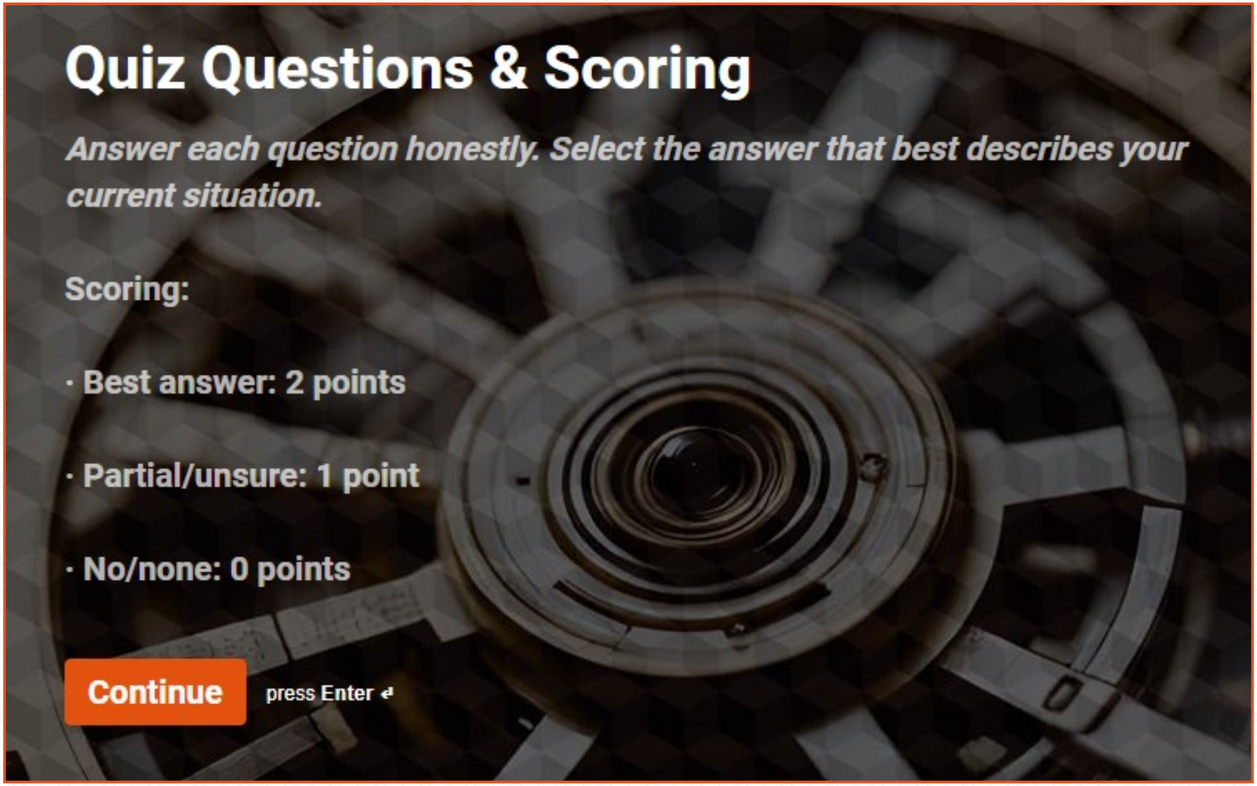
Legacy & Estate Planning Readiness Quiz
Most people believe estate planning is just about creating a will—but it's much more than that. This quick quiz is designed to help you understand how prepared you really are to preserve your legacy, protect your loved ones, and ensure your wishes are carried out.
In just a few minutes, you'll get a personalized score that reveals how well your estate plan is positioned today—and where you might need to improve. Whether you already have a plan in place or are just getting started, this quiz will help identify gaps, clarify your next steps, and provide access to a professional review if needed.
Start the quiz now and get your free Legacy Readiness Report.
Start
press Enter
Takes 3 minutes

Example Of Quiz Process And Materials

Summary Of Scoring


Quiz Questions & Scoring
Answer each question honestly. Select the answer that best describes your current situation.
Scoring:
· Best answer: 2 points
· Partial/unsure: 1 point
· No/none: 0 points
Continue
press Enter ↵

Example Of Quiz Process And Materials

Example Of Results Page

You Scored: 14 — You're At Risk

You have little or no planning in place. Your legacy may be vulnerable to taxes, delays, or unintended distribution. — Your responses indicate that your legacy and estate plan may be incomplete or outdated. Without proper documentation and strategies, your wishes could be left unfulfilled, and your loved ones may face unnecessary financial burdens, court delays, or family disputes. While this may feel overwhelming, taking the first step today can make all the difference.

It's essential to meet with a qualified financial professional or estate planning attorney. The sooner you begin organizing your estate, the more control and clarity you can provide for those who matter most.

Checklist:

· Create or update your will or trust

· Establish a financial and healthcare power of attorney

· Name beneficiaries on retirement and investment accounts

· Review account titling (consider TOD/POD or joint ownership)

· Avoid probate with proper legal tools (like trusts)

· Talk with an advisor or attorney to start building your plan

Let's help you build a clear, customized legacy plan.

Schedule A Consultation press Enter ↵

Example Of Quiz Process And Materials

The Consumer Receives Via Email

Legacy/Estate Planning Quiz

SCORE

11

Your Personalized Result

Hi Barry ,

Thank you for taking the **Legacy/Estate Planning Assessment**. Based on your results:

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- Review account titling (consider TOD/POD or joint ownership)
- Avoid probate with proper legal tools (like trusts)
- Talk with an advisor or attorney to start building your plan

Let's help you build a clear, customized legacy plan.

SCHEDULE YOUR LEGACY REVIEW

Example Of Quiz Process And Materials

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LEGACY READINESS SCORE

14

At Risk

Your responses indicate you have little or no estate plan in place—your legacy may be vulnerable to taxes, court delays, or unintended distribution. Without proper documentation and legal strategies, your wishes could go unfulfilled, and your loved ones may face unnecessary financial burdens, probate delays, or family disputes. While it may feel overwhelming, taking the first step today can make all the difference.

Understanding Legacy Planning Levels

See how your score compares to typical legacy-planning profiles at each stage:

At Risk — Well-Positioned

0-14 At Risk — *Your Score*

You have little to no wills, trusts, powers of attorney, or beneficiary designations in place.

15-24 Moderately Prepared

Some foundation exists—consider updating trusts, titling, and powers of attorney.

25+ Well-Positioned

You've built a comprehensive plan—now optimize for tax efficiency and family harmony.

Key Insight

Protect Your Legacy First

Focus on creating or updating your will, trust, and powers of attorney.

Your Profile

Early Estate Planner

You've acknowledged the need for legacy planning but still need key documents and strategies in place.

Next Step

Schedule a Planning Session

Meet with an estate-planning attorney or financial professional to build a customized plan.

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Let’s Talk About Legacy & Estate Planning

Legacy planning isn’t one-size-fits-all—guidelines can vary widely. Your ideal approach evolves with your family situation, assets, and life stage. That’s why assessing your legacy-planning readiness and comparing it to typical benchmarks is critical. If there’s a gap, it could leave your loved ones facing legal delays, unexpected taxes, or family disputes.

60%
of adults have no documented will

2x
more likely heirs incur probate costs

$50K
average in unexpected estate taxes & fees

Personalized Plan
Tailored to your income, goals, and timeline

Ongoing Reviews
Keep your documents and strategies up to date

Risk Management
Guard your legacy against taxes, delays, and disputes

Ready to Secure Your Legacy?

Let’s build your customized estate blueprint—so you can protect what matters most.

Schedule A Consultation

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