Life Insurance Quiz

Implementation & "Why" Guide

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Life Insurance Quiz

Turn life insurance questions into planning conversations.

What It Is

The Life Insurance Coverage Confidence Quiz is designed to help individuals evaluate how confident they feel that their current life insurance planning still reflects their lives today. Rather than attempting to determine whether someone has the “right” amount of life insurance, the quiz encourages thoughtful self-assessment around life changes, beneficiary alignment, financial responsibilities, long-term goals, and overall planning confidence.

The objective is not to provide recommendations or determine whether coverage is sufficient. Instead, the quiz helps identify opportunities for meaningful conversations and thoughtful review. Before beginning the quiz, participants provide their contact information, which is automatically captured in your Google Spreadsheet. This allows you and your team to review submissions, monitor new leads, and follow up efficiently.

SCORE RANGE	CONFIDENCE LEVEL	MEANING
85–100	**Strong Foundation**	Your responses suggest a relatively strong level of awareness, alignment, and overall confidence.
65–84	**Areas Worth Revisiting**	Your responses suggest there may be areas for planning or coverage worth reviewing further.
Below 65	**Opportunity for Greater Clarity**	Your responses suggest there may be gaps, unanswered questions, or areas for planning that have not been reviewed recently.

The Planning Philosophy

The Life Insurance Coverage Confidence Quiz is built around one simple idea.

Life changes.

Financial plans should evolve with it. Many people purchased life insurance years ago. Since then, careers may have changed. Families may have grown. Children may have become financially independent. Retirement may be approaching. Estate plans may have evolved.

The purpose of this quiz is not to determine whether someone has enough life insurance. It is to help them evaluate whether their planning still reflects the life they are living today.

Every conversation should begin with curiosity, continue with education, and conclude with thoughtful planning, not pressure.

Why It Works

Life insurance is often viewed as a one-time purchase rather than an ongoing planning decision. As a result, many policies remain untouched for years while the lives they were designed to protect continue to evolve.

The Life Insurance Coverage Confidence Quiz changes that conversation.

Instead of focusing on products or policy recommendations, it encourages prospects to evaluate how confident they feel about their current planning. The quiz creates awareness without relying on fear, urgency, or sales pressure. It naturally opens the door to discussions about life changes, beneficiaries, financial responsibilities, retirement, and broader financial planning.

Most importantly, it positions you as a planning professional who helps clients evaluate alignment before making recommendations.

Ways To Use It

TV CTA: “Life changes. The question is whether your life insurance planning changed with it. Scan the QR code or visit [DOMAIN NAME] to take our free Life Insurance Coverage Confidence Quiz.”*

RADIO CTA: “When was the last time you reviewed your life insurance? Take our free Life Insurance Coverage Confidence Quiz at [DOMAIN NAME] and see how confident you feel about your current planning.”*

DIGITAL MARKETING: Share educational content focused on life changes instead of products. Examples include:

- Has your life changed since you purchased your policy?
- Would your beneficiaries still reflect your wishes today?
- When was the last time you reviewed your coverage?

Invite readers to take the quiz as a simple first step toward evaluating their planning.

**We always emphasize the need to have a simple URL that can easily be remembered.*

SOCIAL MEDIA: Use short educational videos or graphics centered around common life changes:

- Marriage
- Children
- Retirement
- Paying off a mortgage
- Business ownership
- Empty nesting

End each post with an invitation to take the quiz.

WORKSHOPS/LIVE EVENTS: Introduce the quiz before or after presentations on:

- Retirement Planning
- Estate Planning
- Legacy Planning
- Income Planning
- Financial Planning

The quiz serves as an excellent discussion starter rather than a sales tool.

ANNUAL CLIENT REVIEWS: Encourage clients to retake the quiz whenever major life events occur or during annual reviews. Comparing responses over time often creates valuable planning conversations.

Conversation Starters

“Life changes. The question is whether your coverage evolved with it.”

“Many people own life insurance. Far fewer feel confident they understand how it works today.”

“When your current coverage was established, what was happening in your life?”

“The purpose of this quiz is not to recommend a product. It simply helps identify whether your planning still reflects your current life.”

“Sometimes the most valuable planning conversation begins with a simple question.”

Advisor Best Practices

- Position the quiz as an educational planning tool rather than a lead generation tool.
- Lead with curiosity before recommendations.
- Ask about life changes before discussing policies.
- Focus conversations on planning, alignment, and confidence.
- Use the quiz to uncover assumptions rather than identify deficiencies.
- Encourage spouses or partners to take the quiz together.
- Incorporate the quiz into annual client reviews and planning meetings.
- Promote your custom domain consistently across television, radio, websites, social media, email signatures, newsletters, printed materials, and presentations.

Lead Follow-Up Strategy

Every quiz submission represents an opportunity to begin a long-term planning relationship.
Reach out within 24 to 48 hours to thank the individual for completing the quiz and offer to review the results together.

Rather than immediately discussing insurance products, begin by exploring how their life has changed since their current coverage was established.

Ask about:

- Family changes
- Financial responsibilities
- Beneficiary designations
- Employment changes
- Business ownership
- Retirement goals
- Estate planning

Use those conversations to better understand whether their current planning still aligns with their goals.

Lead Follow-Up Strategy *Cont.*

Continue nurturing these relationships through educational email campaigns covering topics such as:

- Beneficiary reviews
- Life insurance planning
- Retirement planning
- Estate planning
- Legacy planning
- Major life events
- Annual financial checkups

Consistent educational communication helps build trust over time and positions you as a long-term planning resource.

Access & Personalization

Each Life Insurance Coverage Confidence Quiz is fully customized with your firm's logo, disclosures, branding, and personalized domain name to provide a consistent client experience.

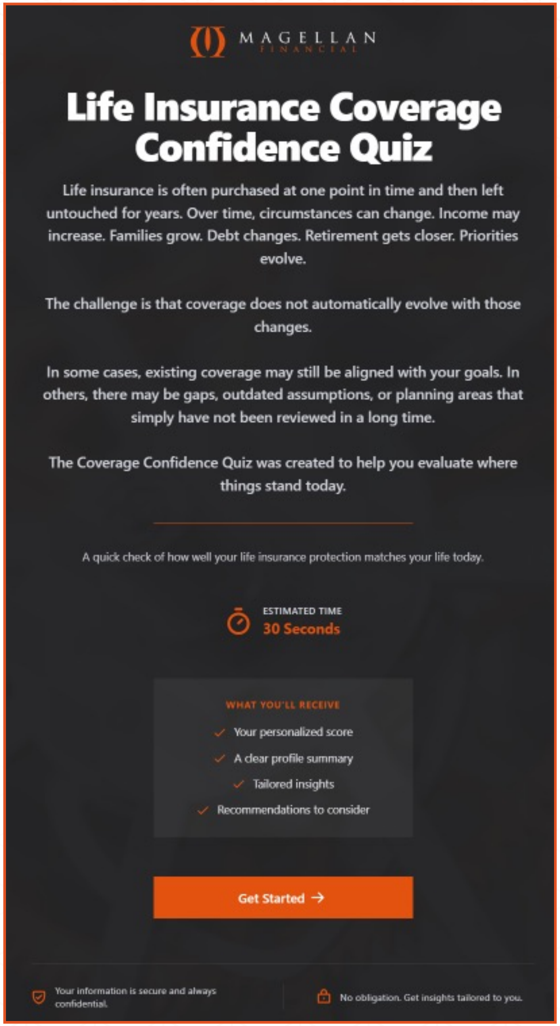
All quiz submissions are automatically delivered to your dedicated Google Spreadsheet, allowing your team to review responses, monitor new leads, and manage follow-up activities from one centralized location.

The quiz also includes personalized results pages, an automated email, and a downloadable report that reinforces the educational nature of the conversation while encouraging prospects to continue the planning process.

For setup assistance or questions, contact the Magellan Marketing Team.

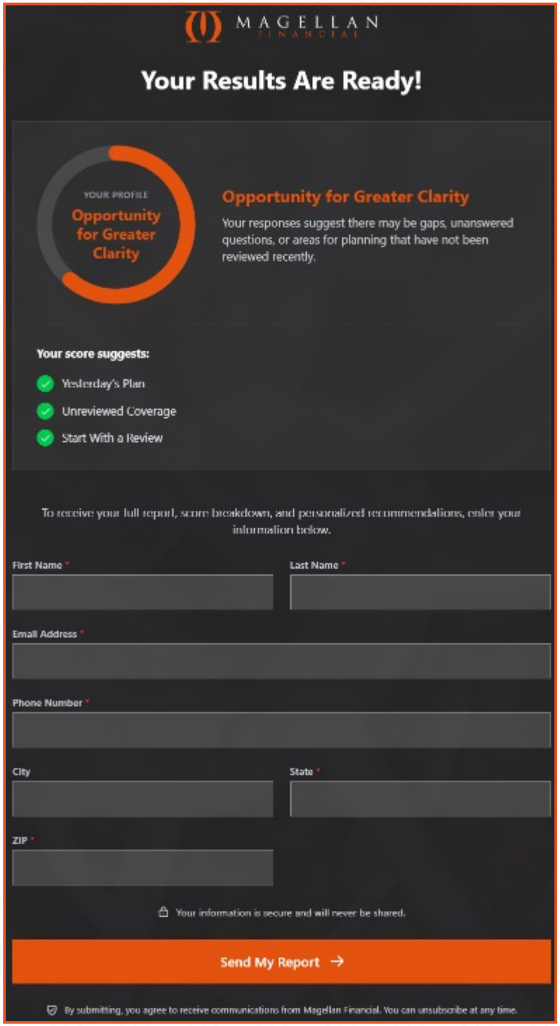
Example Of Quiz Process And Materials

Introduction Page



Example Of Quiz Process And Materials

Results Page



Example Of Quiz Process And Materials

Results Page After Personal Information Submitted

Example Of Quiz Process And Materials

Consumer Email

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Life Insurance Quiz

SCORE

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Opportunity for Greater Clarity

Hi Rachael,

Thank you for completing the **Life Insurance Quiz**. Here are your personalized results:

Your responses suggest there may be important areas of your current financial protection strategy that have not been reviewed recently or may no longer reflect your situation today.

Life insurance is often put in place during a very specific season of life. The challenge is that life continues evolving long after the policy is established.

Families grow, responsibilities shift and financial obligations change. The question is whether your coverage changed with them.

Several of your responses suggest there may be value in reviewing:
- Whether your current level of protection still aligns with your responsibilities today
- Whether beneficiaries and policy structures have been updated appropriately
- Whether there may be gaps, outdated assumptions, or planning areas that deserve additional attention

While this does not necessarily indicate a problem, it may be worthwhile to review your current situation sooner rather than later.

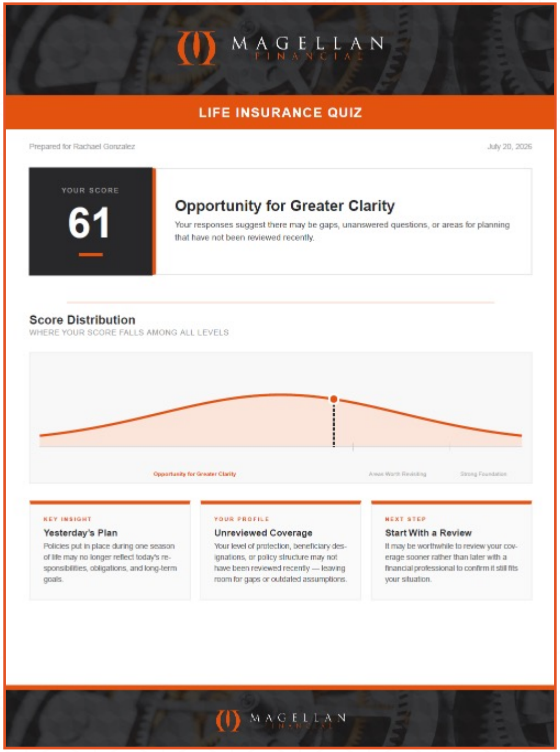
Download Rethinking Life Insurance

A modern guide covering how life insurance has evolved and how different policy structures are being used today. There is no obligation and no assumption that changes are needed. The goal is simply clarity.

DOWNLOAD THE GUIDE

Example Of Quiz Process And Materials

Two-Page Personalized
Report | Page 1



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LIFE INSURANCE QUIZ

Prepared for Rachael Gonzalez

July 20, 2026

YOUR SCORE

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Opportunity for Greater Clarity

Your responses suggest there may be gaps, unanswered questions, or areas for planning that have not been reviewed recently.

Score Distribution

WHERE YOUR SCORE FALLS AMONG ALL LEVELS

Opportunity for Greater Clarity

Areas Worth Revisiting

Strong Foundation

KEY INSIGHT

Yesterday's Plan

Policies put in place during one season of life may no longer reflect today's responsibilities, obligations, and long-term goals.

YOUR PROFILE

Unreviewed Coverage

Your level of protection, beneficiary designations, or policy structure may not have been reviewed recently — leaving room for gaps or outdated assumptions.

NEXT STEP

Start With a Review

It may be worthwhile to review your coverage sooner rather than later with a financial professional to confirm it still fits your situation.

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Example Of Quiz Process And Materials

Two-Page Personalized Report | Page 2