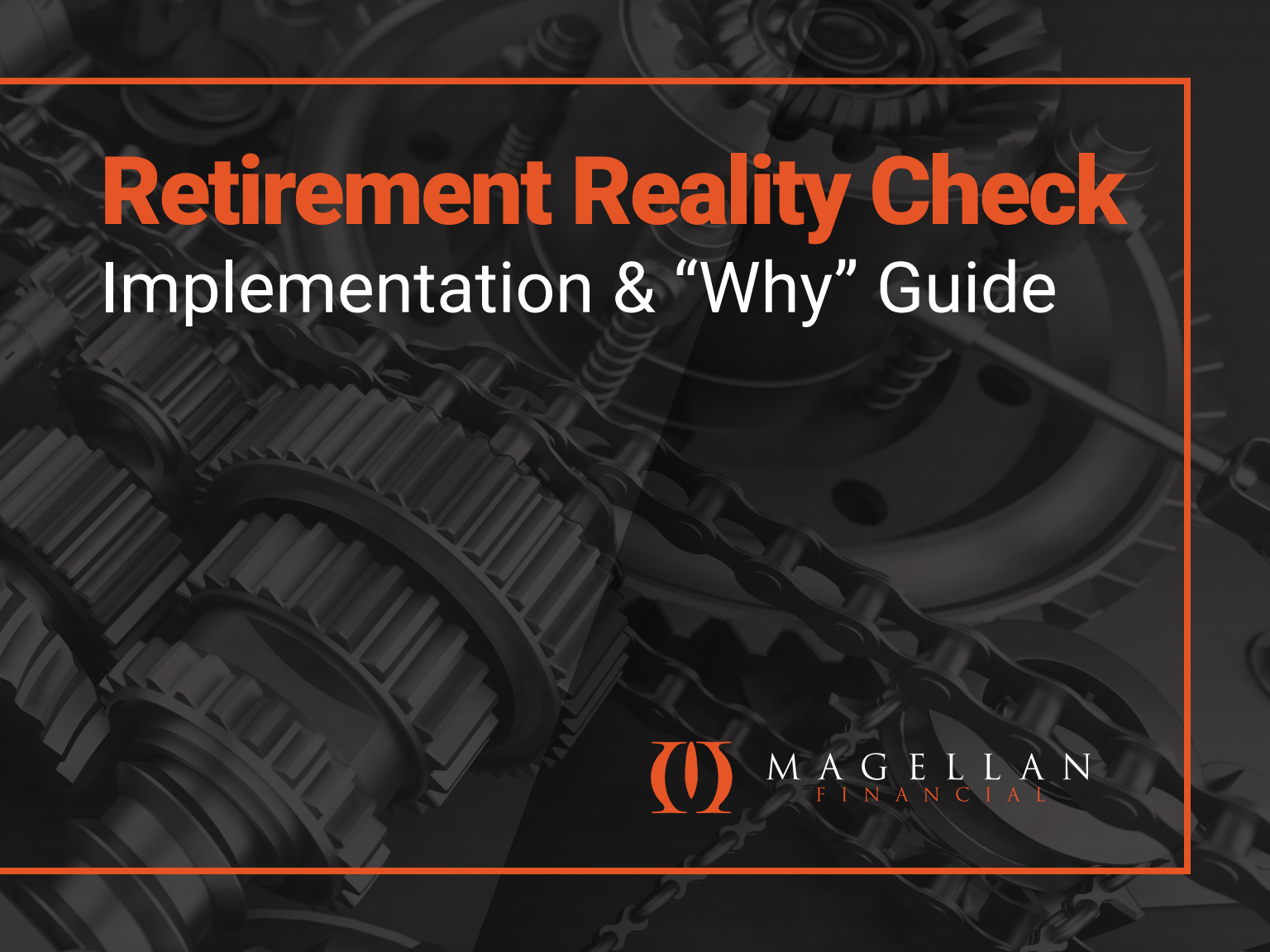




Retirement Reality Check

Implementation & “Why” Guide



MAGELLAN
FINANCIAL



Retirement Reality Check Quiz

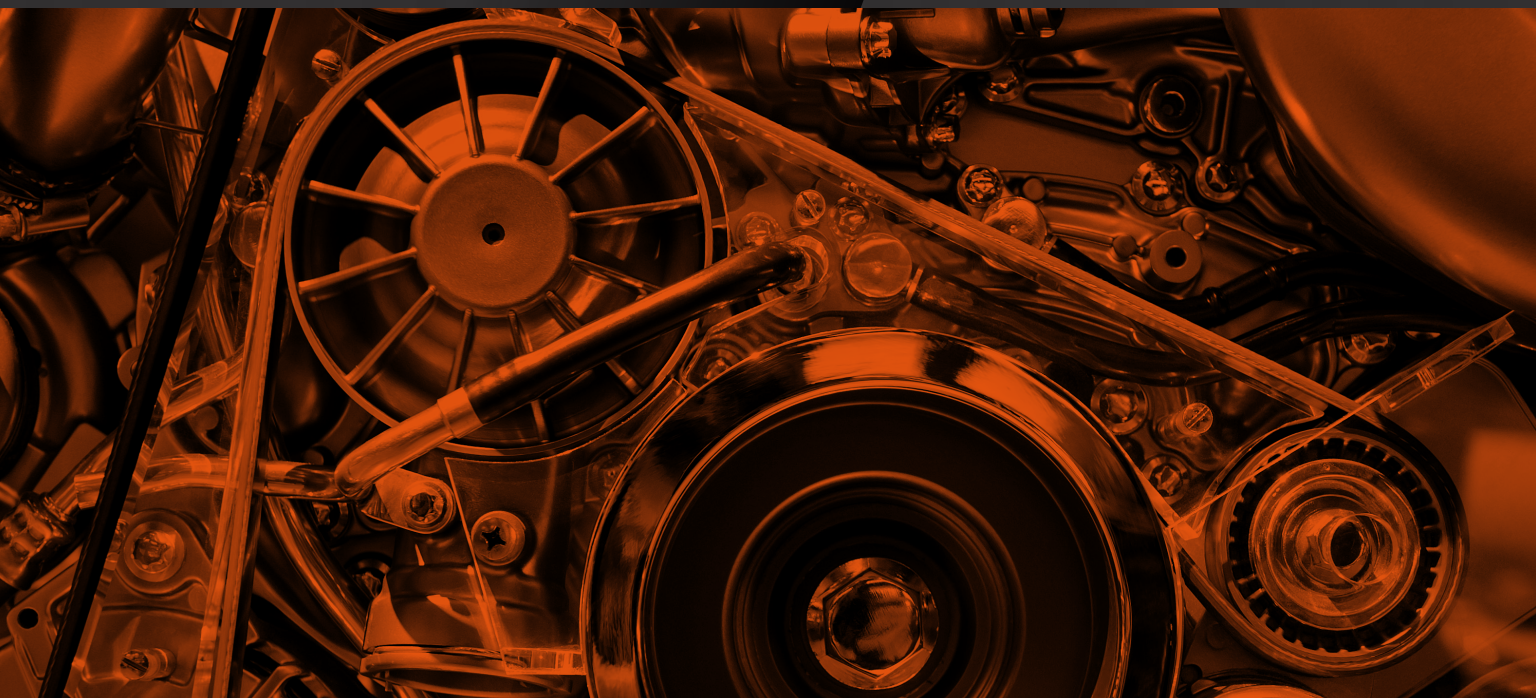
Turn curiosity into conversations and conversations into clients

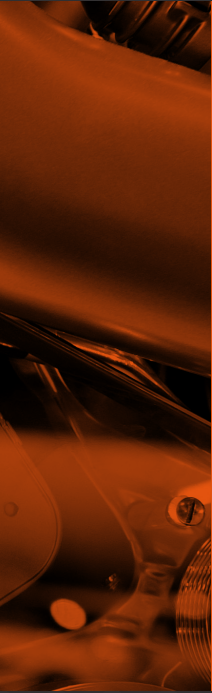
What It Is

A fast, interactive quiz that gets prospects thinking and talking about how ready they are for retirement. The Retirement Reality Check features 30 true/false questions about income, taxes, Social Security, healthcare, liabilities, and risk management. Each response contributes to a readiness score.

SCORE RANGE	CATEGORY	MEANING
0–14	Low	Needs major planning
15–24	Moderate	On the right track
25–36	Growth-Oriented	Building strength
37+	Aggressive	Strong foundation

Each practice receives a Google Spreadsheet that automatically collects all quiz submissions. This sheet contains each lead's contact details, responses, and readiness scores, enabling you and your team to track new leads and manage follow-ups efficiently without having to sift through individual email notifications.



A close-up, low-angle shot of a car engine, showing various mechanical components like the belt, pulleys, and hoses. The lighting is dramatic, with strong highlights and deep shadows, giving it a technical and powerful feel.

Why It Works

- Turns a cold audience into an engaged conversation starter.
- Reveals hidden risks in retirement plans and motivates action.
- Creates urgency to “close the gap” where clients scored low.
- Positions you as the expert offering clarity and next steps.

Ways To Use It

TV CTA: “Are you ready to retire? It’s a simple question, but one that many people struggle to answer with confidence. Scan the QR code on the screen or visit [DOMAIN NAME] to take our Retirement Reality Check Quiz.

RADIO CTA: “Are you ready to retire? Many people aren’t sure, but when it comes to your future, ‘I don’t know’ is not a great answer. Take our Retirement Reality Check Quiz at [DOMAIN NAME].”

DIGITAL/SOCIAL MEDIA: Post graphics or short videos highlighting average scores or surprising facts (“Most retirees score below 25 their first time!”).

WORKSHOPS/LIVE EVENTS: Use it as a pre-event quiz or door prize entry: “Complete your Retirement Reality Check to win a free consultation!”

CLIENT REVIEWS: Have existing clients retake the quiz annually to showcase progress.





Conversation Starters

"Most people are surprised by their score, and that's where real planning begins."

"Want to see how your readiness compares to others your age?"

"It's a simple quiz, but it's the best seven minutes you'll spend today."

Advisor Best Practices

- Display your short custom domain on all print, social, and media materials.
- Review submissions daily from your dashboard and follow up promptly.
- Use the score range to focus your first call on education instead of sales.
- Encourage prospects to share their results with a spouse or family member to create more meeting opportunities.





Lead Follow-Up Strategy

Every quiz submission should be seen as part of your long-term marketing plan. Reach out to them quickly, thank them for participating, and share extra insights or content related to their quiz results. Add each lead to your drip funnels or automated email campaigns to maintain ongoing engagement.

Think of these leads as a long-term commitment; consistent, value-focused communication will foster trust and familiarity. Remain top of mind with educational emails, relevant content, and timely reminders so that when they're ready to act, you're the first advisor they contact.





Access & Personalization

Each practice's Retirement Reality Check Quiz is fully branded with your firm's logo and disclosures. The follow-up results email is also tailored to your brand, ensuring a consistent client experience.

A memorable domain (e.g., MagellanQuiz.com) directly links to the quiz, making it simple to share on TV, radio, or digital platforms.

All responses are saved in your Google spreadsheet, allowing you to view leads quickly, update their status, and effectively manage the client journey.

For setup or questions, contact your Magellan Marketing Team.



Example Of Quiz Process And Materials

Introduction Page



Retirement Reality Check

Welcome. This is a comprehensive evaluation designed to gauge your preparedness for one of life's most significant transitions.

Begin

press Enter ↵

⌚ Takes 7 minutes



Example Of Quiz Process And Materials

Summary Of Quiz And Topics Covered

Welcome! This quiz is designed to help you determine if you are retirement ready.

Whether you are years away from retirement or considering retiring soon, understanding where you stand can make all the difference in designing a retirement that's as fulfilling as your working years have been.

The following questions will offer you insights into various aspects of retirement planning – including financial stability, income sources, tax implications, Social Security, risk management, healthcare and more. By answering these questions, you'll get a clearer picture on how ready you are for retirement and which areas might need more attention.

Find out how in 7 minutes or less. Isn't it worth 7 minutes of your time to know where you stand?

[Click Here to Get Your Free Retirement Readiness Score!](#)

Continue

press Enter ↵



Example Of Quiz Process And Materials

Summary Of Scoring

b. **How Scoring Works***

After a set of preliminary questions, each question will be answered with "True" or "False". Your responses will produce a score that reflects your overall retirement readiness. The higher your score, the more prepared you are for retirement. Conversely, a lower score indicates areas where your retirement plan may require further development. Please select any of the following to continue.

☐ **Y** Yes

☐ **N** No

OK



Example Of Quiz Process And Materials

Example Of Results Page

Rachael, YOUR OVERALL READINESS SCORE IS: 14/25

Your retirement planning requires significant work, and it's advisable to seek professional guidance.

Submit

press Ctrl + Enter ↵

Example Of Quiz Process And Materials

Example Of Results Page (cont.)

Thank you for your time, Rachael!

If you would like to claim a 2nd opinion from a Wealth Council **Advisor Please** Click the button below. You may close out of this window when you are finished.

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Always consult with a professional.

Get A Second Opinion

press Enter ↵



Example Of Quiz Process And Materials

The Consumer Receives Via Email



Retirement Reality Check

SCORE

12

Your Personalized Result

Hi Rob,

Thank you for taking the **Retirement Reality Check**. Based on your answers, your score suggests there are significant gaps in your retirement plan. This doesn't mean you can't have the retirement you want—only that there's important work to do to get there.

Your results indicate that you may benefit from focusing on:

- Building a clear vision for your retirement goals
- Establishing reliable income streams
- Addressing healthcare costs and potential liabilities
- Creating strategies to reduce taxes in retirement

Retirement planning can be complex, and you don't have to figure it all out alone. We encourage you to get a second opinion from a qualified financial professional who can review your full financial picture and create a plan that addresses your needs.

Let's talk about your goals and put an actionable plan in place. A conversation now could help you avoid costly mistakes later.

For next steps, taking action is the key to success in long term retirements. A short consultation lets us personalize those steps to your situation and timeline.

SCHEDULE YOUR RETIREMENT REVIEW

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Example Of Quiz Process And Materials

2-Page Report | Page 1

RETIREMENT READINESS SCORE

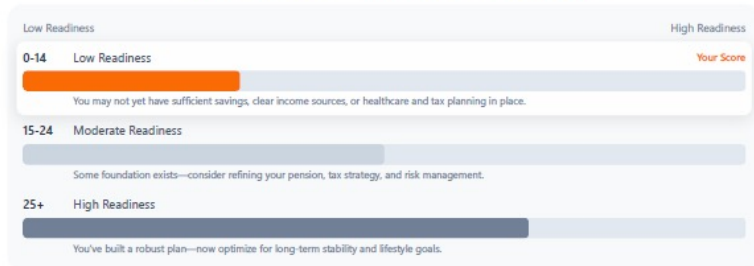
14

Low Readiness

Your results suggest you may not be fully prepared for retirement just yet—and that's okay. You likely need to strengthen key areas like building your savings cushion, clarifying income sources (including Social Security and pension), and planning for healthcare and taxes. Use this time to map out those gaps, set concrete targets, and consider working with a trusted advisor to turn your readiness around.

Understanding Retirement Readiness Levels

See how your score compares to typical retirement profiles at each stage:



Key Insight

Foundation First

Focus on building your savings cushion, clarifying income sources, and planning for healthcare and taxes.



Your Profile

Early-Stage Planner

You've started preparing but need to solidify your roadmap and fill gaps in income and risk planning.



Next Step

Schedule a Strategy Session

Meet with our advisors to review your savings cushion, income sources (pensions, Social Security), and healthcare plan—and map out targeted actions to boost your readiness.

Example Of Quiz Process And Materials

2-Page Report | Page 2



Let's Talk About Retirement

Retirement planning isn't one-size-fits-all—guidelines can vary widely. Your ideal strategy evolves with your career stage, income, and life changes. That's why assessing your readiness sentiment and comparing it to your actual resources is critical. If there's a gap, it could cost you peace of mind and financial security later on.

68%

of pre-retirees underestimate
healthcare costs

3x

more likely to outlive their savings

\$120K

average in unexpected retirement
expenses



Personalized Plan

Tailored to your income, goals, and timeline



Ongoing Reviews

Keep your strategy aligned as life and markets
change



Risk Management

Guard your savings against inflation and
downturns

Ready to Secure Your Future?

Let's build your retirement blueprint—so you can enjoy the lifestyle
you've earned.

[Get A Second Opinion](#)





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