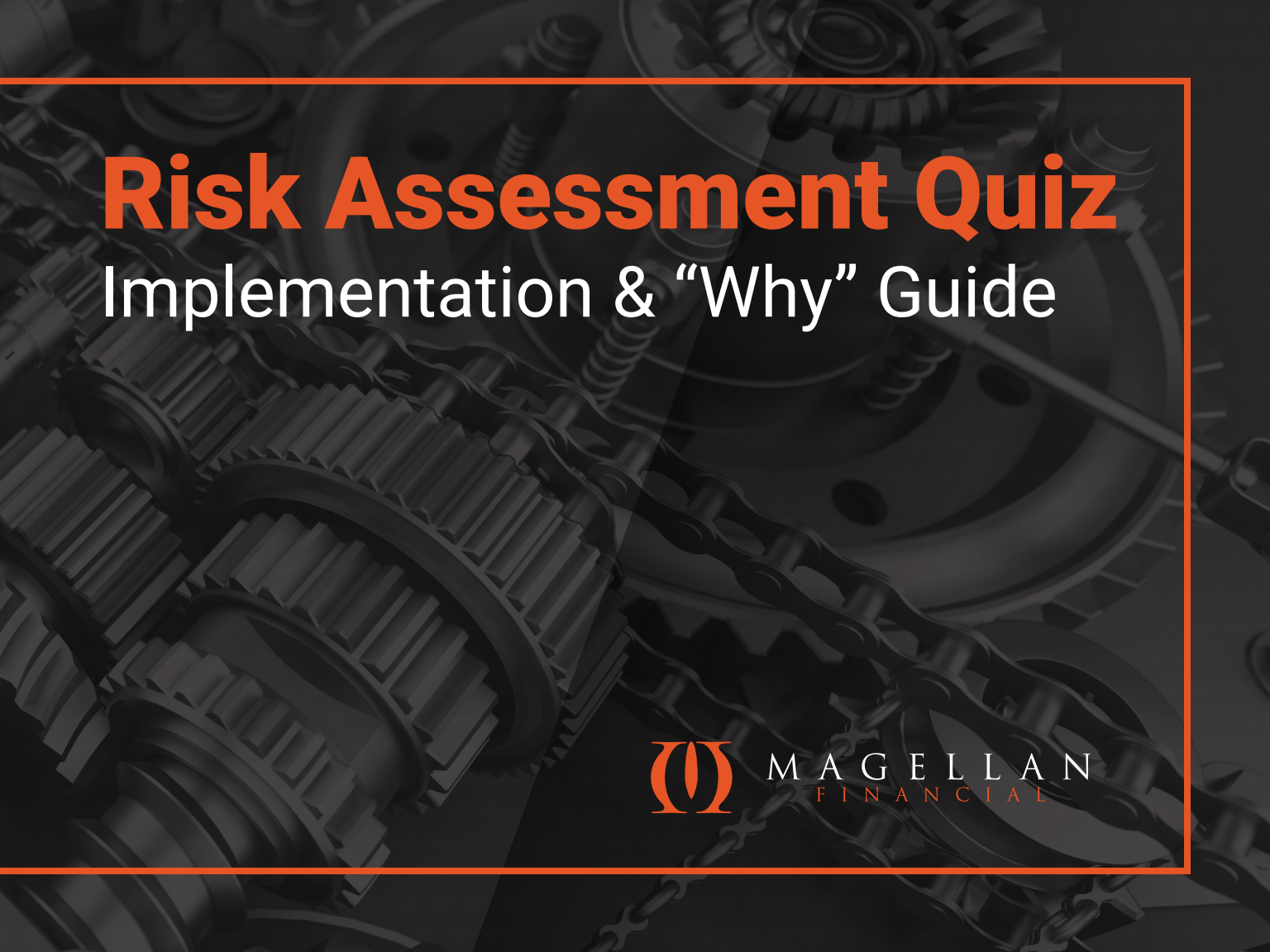




Risk Assessment Quiz

Implementation & “Why” Guide



MAGELLAN
FINANCIAL



Risk Assessment Quiz

Turn one quick quiz into a powerful conversation about risk and confidence

What It Is

A quick, 13-question quiz designed to show prospects how comfortable they truly are with investment risk and if their current portfolio aligns with that comfort level. Each answer scores 0–2 points, with results summarized as Low, Moderate, Growth-Oriented, or Aggressive.

Before taking the quiz, participants fill out their contact details (name, email, phone, address), which automatically feed into your Google Spreadsheet, allowing you and your team to view all submissions and follow up quickly.

SCORE RANGE	RISK PROFILE	DESCRIPTION
0–14	Low	Prefers preservation and stability overgrowth
15–24	Moderate	Balances growth potential with controlled risk
25–36	Growth-Oriented	Comfortable taking calculated risks for higher returns
37+	Aggressive	Seeks maximum growth with high market exposure





Why It Works

- Generates immediate engagement and self-awareness for prospects.
- Turns a cold audience into a warm lead with curiosity and personalization.
- Opens the door to tailored recommendations and portfolio discussions.
- Strengthens your positioning as an expert who helps clients make confident, informed choices.

Ways To Use It

TV CTA: “Are you taking too much or too little risk with your retirement savings? Find out in 4 minutes by scanning the QR code on the screen or visiting [DOMAIN NAME].” This can be long-form or short-form.*

RADIO CTA: “Are you taking too much or too little risk with your retirement savings? Find out in 4 minutes by visiting [DOMAIN NAME].” This can be long-form or short-form. *

DIGITAL MARKETING: Promote the quiz through your website or landing pages as a free “Find Your Risk Profile” tool.

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





SOCIAL MEDIA: Post engaging content such as, *"Many investors don't know their true risk tolerance. Take our free quiz to find out!"*

WORKSHOPS/LIVE EVENTS: Include the quiz as an interactive exercise during investment or retirement workshops. Use results to spark follow-up meetings about portfolio alignment. It could be displayed on a piece of marketing collateral that the prospect takes home. This piece of collateral could have a header and QR code for the quizzes that the advisor has in place.

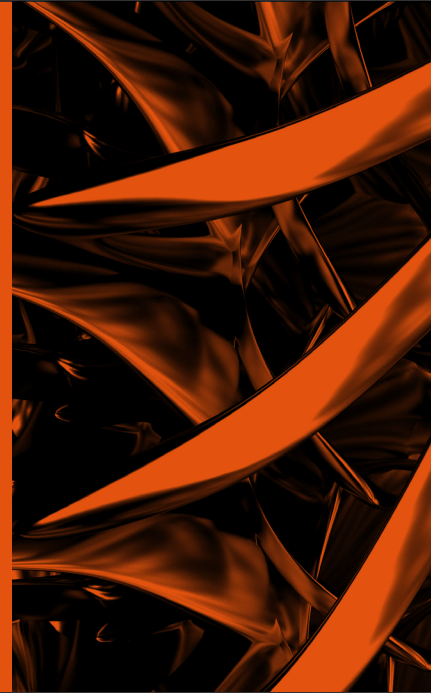
CLIENT REVIEWS: Use the quiz results to discuss whether the client's current portfolio aligns with their risk score.

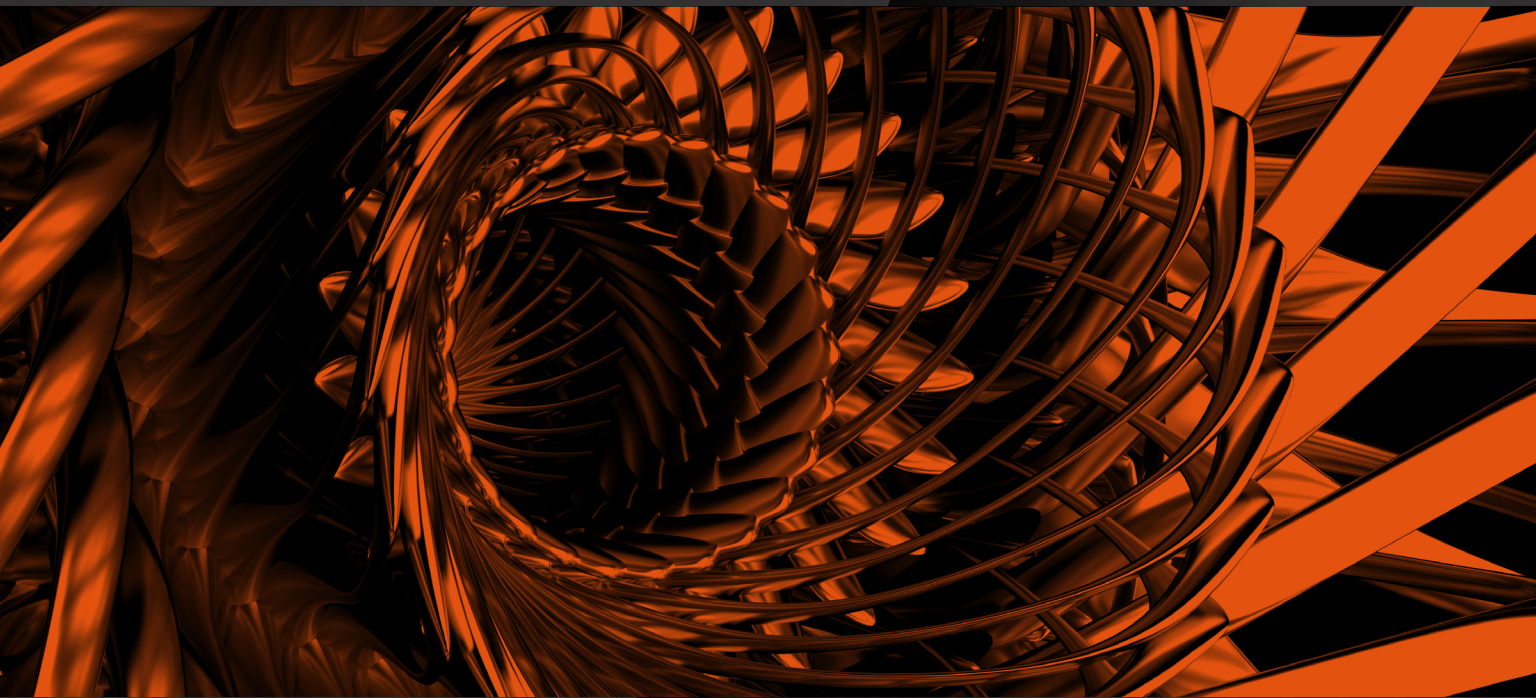
Conversation Starters

"When markets fluctuate, how do you usually react?"

"Your risk score helps us tailor your investments are you ready to see where you fall?"

"Many pre-retirees and retirees are surprised by their results it's a great starting point for planning."





Advisor Best Practices

- Integrate your short domain link into all client touchpoints - media, email, and printed materials.
- Review the email notifications/Google Sheet daily and prioritize follow-ups with high- or low-score leads.
- Use results as a segue to discuss rebalancing or income strategies.
- Track changes over time as clients' risk tolerance evolves.





Lead Follow-Up Strategy

Each quiz submission should be viewed as a relationship-building opportunity, not an instant close. Reach out shortly after receiving each lead to thank them for taking the quiz and offer to review their results together.

Then, add each contact to your drip marketing funnels or automated campaigns to maintain steady engagement. Provide educational resources on topics like market volatility, investment strategy, or diversification to nurture trust over time.

These leads should be treated as a long play. Consistent, personalized communication will position you as their go-to resource when they're ready to take the next step.





Access & Personalization

Each practice's Risk Assessment Quiz is branded with your firm's identity for a professional, cohesive client experience. A custom domain (e.g., MagellanRiskQuiz.com) connects directly to your quiz, making it easy to promote across multiple platforms.

All submissions trigger an auto-email response to the prospect and advisor that feeds into the firm's shared Google Sheet, where leads, responses, and scores can be reviewed and updated.

For setup or questions, contact your Magellan Marketing Team.



Example Of Quiz Process And Materials

Introduction Page And Summary Of The Quiz



Online Interactive Risk Assessment

Risk tolerance is not a fixed attribute. This quiz is designed to help you better understand your current risk profile and provide actionable insights tailored to your needs.

Start

press Enter ↵

⌚ Takes 4 minutes



Example Of Quiz Process And Materials

Summary Of Quiz And Scoring

Quiz Questions & Scoring

Answer each question honestly. Select the answer that best describes your current situation.

Scoring:

- Very Risk Tolerant: 10 points
- Risk Tolerant: 7 points
- Risk Reserved: 3 points
- Very Risk Reserved: 1 points

Continue

press Enter ↵



Example Of Quiz Process And Materials

Example Of Results Page

Your Result: Moderate Investor

You're looking for a balance between **growth and stability**. You're willing to accept some market ups and downs in exchange for long-term progress, but you also value consistency and want to avoid taking unnecessary risks.

As a moderate investor, you likely prefer a strategy that allows you to grow your wealth steadily over time—without the extreme highs and lows that come with a more aggressive approach. You're thoughtful, intentional, and looking for a plan that fits both your goals and your comfort level.

Continue

press Enter ↵

Example Of Quiz Process And Materials

Example Of Results Page (cont.)

Before You Go: Let's Talk About Risk for Real

Here's the tricky thing about "risk"—**every advisor defines it differently**, and those definitions don't always line up with how you actually feel.

Even more? Your comfort with risk isn't fixed. It shifts over time, based on things like your age, life stage, and what's happening in the markets.

That's why it's so important to **measure your risk sentiment**—and compare it with how you're currently invested. If there's a gap, it could be costing you peace of mind, growth, or both.

Submit

press Ctrl + Enter ↵

Example Of Quiz Process And Materials

The Consumer Receives Via Email



Risk Assessment

SCORE

23

Your Personalized Result

Hi Barry,

Thank you for taking the **Risk Assessment**. Your results show that you're focused on striking a healthy balance between growth and stability. You're comfortable with some market movement, but you still value thoughtful risk management and long-term consistency.

Based on your responses, you may want to revisit:

- Whether your portfolio is properly diversified
- How well your investments match your time horizon
- Opportunities to reduce unnecessary risk
- Long-term strategies that support steady, reliable returns

You're already on a strong path; now it's about fine-tuning the details to ensure continued long-term success.

Let's walk through your current allocation and identify ways to reinforce your balanced, forward-thinking strategy.

SCHEDULE YOUR PORTFOLIO REVIEW

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Example Of Quiz Process And Materials

2-Page Report | Page 1

RISK ASSESSMENT SCORE

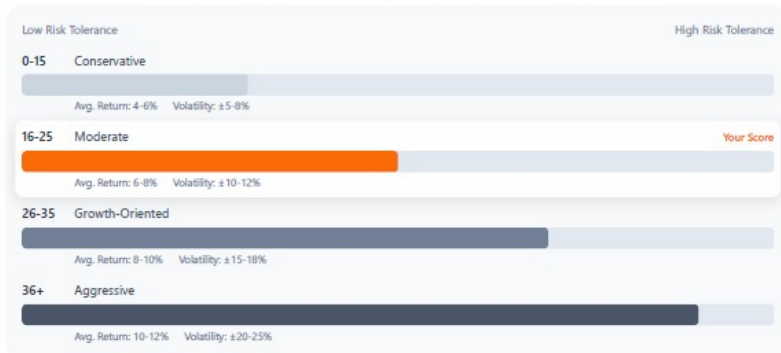
23

Moderate Investor

Your assessment indicates you're a balanced investor—comfortable accepting some market ups and downs for long-term progress, yet keen to avoid unnecessary risk. You value consistency and peace of mind, preferring a thoughtful strategy that blends steady growth with stability so your portfolio stays aligned with both your goals and your comfort level.

Understanding Risk Tolerance Levels

See how your score compares to typical investor profiles and their historical outcomes:



Key Insight

Balance Fuels Progress

Moderate risk can power growth while preserving peace of mind.



Your Profile

Balanced Growth Seeker

Striving for steady wealth building tempered by risk control.



Next Step

Calibrate Your Mix

Fine-tune your allocation to keep growth and stability in sync with your goals.



Example Of Quiz Process And Materials

2-Page Report | Page 2



Let's Talk About Risk for Real

Here's the tricky thing about "risk"—every advisor defines it differently, and those definitions don't always line up with how you actually feel.

Even more? Your comfort with risk isn't fixed. It shifts over time, based on things like your age, life stage, and what's happening in the markets. That's why it's so important to measure your risk sentiment and compare it with how you're currently invested. If there's a gap, it could be costing you peace of mind, growth, or both.

87%

of investors have misaligned portfolios

3x

more likely to panic sell

\$95K

average cost of misalignment



Personalized Strategy

Tailored to your unique goals and risk profile



Regular Reviews

Keep your portfolio aligned as life changes



Risk Management

Protect your wealth while pursuing growth

Ready to Align Your Future?

Let's ensure your investments match your true risk tolerance and help you achieve your financial dreams.

[Schedule Your Consultation](#)





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