Roth Conversion Quiz

Implementation & “Why” Guide

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Roth Readiness Quiz

Turn tax curiosity into powerful retirement conversations

What It Is

A quick 14-question quiz that helps prospects assess their readiness for a Roth conversion and whether it might be the right decision for their future.

Before starting, each participant enters their contact info, which automatically feeds into your Google Spreadsheet, allowing you and your team to see new leads instantly and manage follow-up.

Advisors can also boost the quiz during TV appearances by showing their domain name and a QR code on screen, encouraging viewers to act now.

Why It Works

- Roth conversions are a key concern for retirees. This quiz offers clarity and guidance.
- Makes a complex technical topic simple and engaging.
- Creates a steady stream of warm leads passionate about tax-efficient retirement planning.
- Establishes trust by emphasizing education before proposing solutions.

Ways To Use It

TV CTA: "Could a Roth conversion help you reduce taxes in retirement? Find out in 3 minutes by scanning the QR code on the screen or visiting [DOMAIN NAME]."

RADIO CTA: "Are you wondering if a Roth conversion is right for you? Find out in 3 minutes at [DOMAIN NAME]."

DIGITAL/SOCIAL MEDIA: Promote through targeted ads or videos with bold CTAs like *"Don't leave your money to the IRS, test your Roth readiness today."*

WORKSHOPS/LIVE EVENTS: Use as a pre-event registration incentive or an interactive activity at tax-focused workshops.

CLIENT REVIEWS: Incorporate the quiz as a fun, engaging way to revisit tax diversification and Roth strategies.

Conversation Starters

“Do you know if a Roth conversion could save you thousands in future taxes?”

“Let’s quickly assess your readiness; this quiz makes it easy to see where you stand.”

“Many people are surprised by their results; it’s a great way to start the conversation.”

Advisor Best Practices

- Mention the quiz during your TV segments and encourage viewers to scan the QR code or visit your short domain.
- Check the Google Sheet daily for new submissions and follow up quickly.
- Add all leads to your drip funnels to maintain contact with educational, value-driven communication.
- Maintain engagement by sharing relevant Roth updates, tax changes, or success stories.

Lead Follow-Up Strategy

Treat every quiz submission as the beginning of a long-term relationship. Respond promptly, set up a conversation, and follow up regularly with educational content. Use drip campaigns, newsletters, and targeted emails to keep prospects engaged until it's the right time to schedule a meeting.

These leads require a long-term approach: stay consistent and helpful, and conversions will happen naturally when clients are ready to act.

Access & Personalization

Each practice's quiz features your firm's logo, disclosures, and a custom domain (e.g., MagellanRothQuiz.com) for easy sharing.

All results are automatically sent to your Google Spreadsheet, providing you and your team with a unified view of all new leads and responses.

For setup or questions, contact the Magellan Marketing Team.

Example Of Quiz Process And Materials

Introduction Page


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Roth Readiness Quiz
Retirement isn't just about how much you've saved, it's about how much you get to keep. The majority of Americans have built their nest eggs in tax-deferred accounts like IRAs and 401(k)s, without realizing just how much of that money the IRS may still lay claim to.
Every dollar in a tax-deferred account is a dollar that hasn't been taxed yet. And when you retire, the IRS will be waiting. Required Minimum Distributions (RMDs), Social Security taxation, and Medicare IRMAA surcharges can all increase your tax burden — and eat away at your income just when you need it most.
Start
press Enter ↵
Takes 3 minutes

Example Of Quiz Process And Materials

Summary Of Quiz

Why You're Here

You've worked hard, saved diligently, and built up a retirement nest egg in your IRA or 401(k). But what most people don't realize is that those accounts aren't entirely yours. You have a partner... Uncle Sam.

Every dollar in a tax-deferred account is a dollar that hasn't been taxed yet. And when you retire, the IRS will be waiting. Required Minimum Distributions (RMDs), Social Security taxation, and Medicare IRMAA surcharges can all increase your tax burden, and eat away at your income just when you need it most.

The recent passage of the Big Beautiful Bill extended the current low tax brackets, giving retirees and pre-retirees more time to act. But it didn't eliminate the risk. Federal debt is at historic levels, and future administrations could still change the rules. That's why it's important to assess your exposure today, before the opportunity window begins to close.

This quiz is designed to help you evaluate your current position, and whether a Roth conversion could help you take control of your future tax obligations. It's not a tax advice tool. It's a clarity tool. Because knowing the rules you're playing by today can help you win tomorrow.

Each question will contribute to an overall readiness score and guide the user toward appropriate next actions.

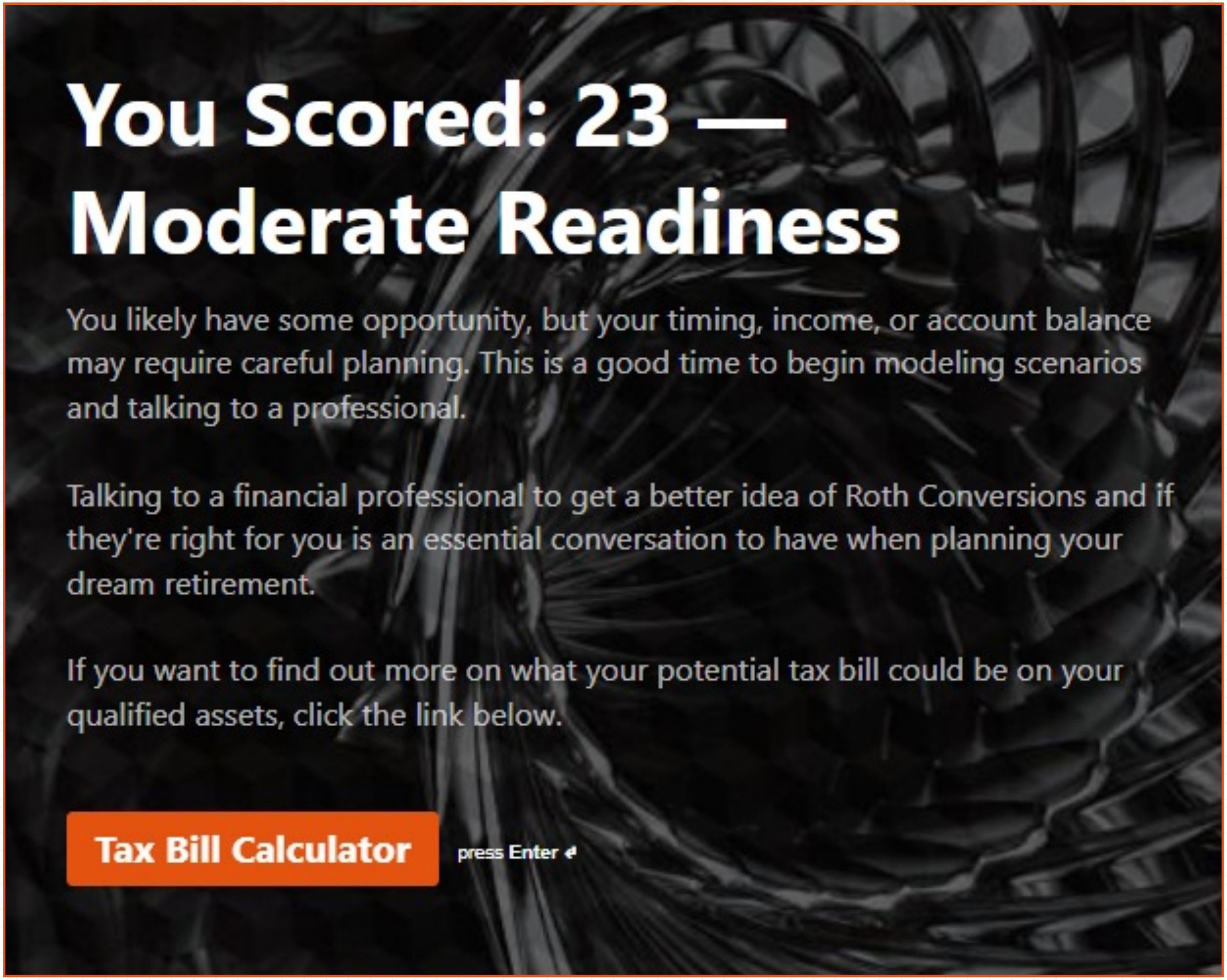
Instructions

Answer the following questions as accurately as possible. Each one is designed to uncover a different piece of your financial picture — including how much control you have over your income, how much tax exposure you carry, and how much time you have left to take action.

Continue press Enter ↵

Example Of Quiz Process And Materials

Example Of Results Page


You Scored: 23 — Moderate Readiness
You likely have some opportunity, but your timing, income, or account balance may require careful planning. This is a good time to begin modeling scenarios and talking to a professional.
Talking to a financial professional to get a better idea of Roth Conversions and if they're right for you is an essential conversation to have when planning your dream retirement.
If you want to find out more on what your potential tax bill could be on your qualified assets, click the link below.
Tax Bill Calculator
press Enter ↵

Example Of Quiz Process And Materials

The Consumer Receives Via Email

Roth Readiness Quiz

SCORE

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Your Personalized Result

Hi Steve,

Thank you for taking the **Roth Readiness Quiz**.

Your results suggest you likely have some opportunity, but your timing, income, or account balance may require careful planning. This is a good time to begin modeling different conversion scenarios and talking to a professional.

Talking to a financial professional to get a better idea of Roth conversions, and whether they're right for you, is an essential step when planning your dream retirement.

If you want to find out more about what your potential tax bill could be on your qualified assets, reviewing your options now can help you make more informed, tax-smart decisions.

USE OUR TAX BILL CALCULATOR

Example Of Quiz Process And Materials

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ROTH READINESS SCORE

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Moderate Readiness

Your results suggest that you're entering a window of opportunity. You likely have the right combination of income, assets, and time horizon to benefit from a Roth conversion, but doing it the right way matters. Strategic planning today could result in major tax savings later, but only if you begin mapping out your conversion plan while you still have flexibility.

Understanding Roth Conversion Readiness Levels

See how your score compares to typical readiness profiles and what you can expect at each stage:

Low Readiness — High Readiness

0-15 Low Readiness

Limited Roth assets, tight tax-bracket space, and/or active RMDs are constraining your flexibility.

16-25 Moderate Readiness — Your Score

You've started building Roth assets or have some bracket headroom—but you'll want to fine-tune timing and strategy.

26-35 High Readiness

Strong Roth cushion, ample low-tax space, and clear conversion goals make you well-positioned to convert.

Key Insight

Growth in Progress

You've laid the groundwork by starting Roth assets or optimizing bracket headroom; now dial in your conversion amounts and timing for maximum efficiency.

Your Profile

Opportunity-Ready

You're positioned to capitalize on low-tax years but benefit from a detailed roadmap to ensure consistency and tax control.

Next Step

Use Our Tax Calculator

See how much of your retirement is at risk of future taxation

Example Of Quiz Process And Materials

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Let's Talk About Roth Conversions

The tricky thing about a "Roth conversion"—**every advisor defines its ideal timing differently**, and what works for one person may not work for another. Your optimal conversion strategy shifts over time based on your income, tax landscape, and life stage.

That's why it's so important to gauge your **Roth readiness sentiment** and compare it to your actual tax posture. If there's a mismatch, you could be leaving significant tax-free growth on the table.

72%
of investors delay conversions until it's too late

2.5x
more likely to face unexpected tax spikes

$85K
average in foregone tax-free growth

Personalized Conversion Plan
Tailored to your income, bracket, and long-term goals

Scheduled Tax Check-Ins
Keep your conversion strategy aligned as your taxes and life change

Tax-Free Growth
Maximize your tax-free assets for steady, protected growth

Ready to Convert with Confidence?

Let's build your Roth conversion roadmap—so you can grow your nest egg tax-efficiently and hit your retirement goals.

Tax Bill Calculator

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