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# Pre-Retirement Strategies: Top Tasks to Complete Before Retirement

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Are you preparing for retirement? Will you have enough income to live the lifestyle you desire? When will you be eligible for Medicare? Social Security? Wish you had a to do list to help you prepare for retirement?

Every successful journey requires proper planning and preparation. Whether you are a few years away from retirement or just starting to think about your retirement planning, this presentation will help you understand the key factors that impact your retirement income and how to make the most of your retirement savings.

We will provide you with practical guidance on how to plan for a financially secure retirement. We will discuss various pre-retirement strategies, including retirement planning, investment management, and wealth preservation.

Join us, as a BOK Financial representative will cover various topics, including:

- Picturing your lifestyle in retirement
- Evaluating your expenses and creating an income plan
  - Tips for optimizing your Social Security benefits
  - Forecasting your medical costs with Medicare
  - Creating a sustainable withdrawal plan
- Strategies for minimizing your taxes during retirement
- Preparing your portfolio investments for retirement
- Planning your estate