

DSCEU - Estate Due Diligence Preparation - File Naming Format

Folder Names

Create one folder and these subfolders before you start Estate Due Diligence Preparation.

Estate_Due_Diligence

1_ID

2_Legal

3_Bank_Accounts

4_Real_Estate

5_Insurance

6_Retirement

7_Debts

8_Business

9_Assets_Other

Simple File Naming Format

Use this format so files sort cleanly and are easy to find:

- Format: Last_First_DocumentType_YYYY-MM-DD
- Use short, consistent document types (ID, Will, Trust, POA, Deed, Mortgage, Statement, Insurance).

Examples

Last_First_ID_YYYY-MM-DD.pdf

Last_First_Will_YYYY-MM-DD.pdf

Last_First_Trust_YYYY-MM-DD.pdf

Last_First_POA_Financial_YYYY-MM-DD.pdf

Last_First_AdvanceDirective_YYYY-MM-DD.pdf

Last_First_BankStatement_BankName_YYYY-MM.pdf

Last_First_Deed_PropertyNickname_YYYY-MM-DD.pdf

Last_First_Mortgage_PropertyNickname_YYYY-MM.pdf

Last_First_Insurance_Policy_YYYY-MM.pdf

