

Secure Trust Application File Organization

Folder Structure and File Naming

1. Folder structure

Create the folder structure below before you start your secure trust application. This makes uploads faster and reduces missing items.

Folder names (copy and paste):

Secure_Trust_Application

1_ID

2_Legal

3_Trust_Parties

4_Beneficiaries

5_Real_Estate

6_Bank_Brokerage_Retirement

7_Insurance

8_Debts

9_Business

10_Other

2. Simple file naming format

Use the format below so files stay readable and easy to locate later. Avoid special characters. Do not include sensitive identifiers in file names.

- Format: Last_First_DocumentType_YYYY-MM
- Example: Smith_Jane_ID_2026-01.pdf

Examples (copy and paste):

Last_First_ID_YYYY-MM.pdf

Last_First_Trust_or_Will_YYYY-MM.pdf

Last_First_POA_Financial_YYYY-MM.pdf

Last_First_AdvanceDirective_YYYY-MM.pdf

Last_First_HealthcareProxy_YYYY-MM.pdf

Last_First_Deed_PropertyNickname_YYYY-MM.pdf

Last_First_Mortgage_PropertyNickname_YYYY-MM.pdf

Last_First_PropertyTax_PropertyNickname_YYYY-MM.pdf
Last_First_BankStatement_BankName_YYYY-MM.pdf
Last_First_Brokerage_Provider_YYYY-MM.pdf
Last_First_Retirement_Provider_YYYY-MM.pdf
Last_First_Insurance_Policy_YYYY-MM.pdf
Last_First_Vehicle_Title_YYYY-MM.pdf
Last_First_Beneficiary_List_YYYY-MM.pdf
Last_First_Asset_List_YYYY-MM.xlsx
Last_First_Debt_List_YYYY-MM.xlsx

3. If a file is too large

If a PDF is too large to upload, compress it or split it into smaller PDFs. If it still fails, email the PDF to sirmalcolm@dsceu.com with a clear subject that includes: Secure Trust Application and the upload step name. Do not email sensitive identifiers.