Document Organizer Recommendation

Courtesy of Rudy Rodriguez

Introduction

Effective probate management starts with organized documentation. This guide walks you through setting up and using a secure document organizer portal to streamline your estate administration.

1. Folder Structure Template

Create folders (and subfolders) following this hierarchy:

2. Step-by-Step Setup Guide

1. **Choose a Cloud Service**

   ➤ Recommended: Google Drive, Dropbox, or OneDrive.

   ➤ Ensure it supports secure sharing and version history.

2. **Create the Main Folder**

   ➤ Name it "Probate Documents – [Estate Name/Decedent]."

3. **Build Subfolders**

   ➤ Use the Folder Structure Template above.

   ➤ Maintain consistent naming conventions for easy navigation.

4. **Upload Initial Documents**

   ➤ Petition for Probate, Will, Death Certificate, Letters of Administration.

   ➤ Ensure scanned files are clear and legible (300 dpi resolution).

5. **Set Permissions**

   ➤ Grant "view" or "comment" access to beneficiaries and co-administrators.

   ➤ Limit "edit" access to trusted individuals (e.g., attorney, executor).

6. **Enable Version History**

➢ Turn on versioning to restore previous document states if needed.

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3. Sharing & Collaboration

✓ **Inviting Collaborators**

➢ Send email invites directly from the cloud service.

➢ Include a brief note on how to navigate the folder structure.

✓ **Organizing Access**

➢ Use group emails (e.g., beneficiaries@estate.com) to manage permissions.

➢ Regularly review access list and revoke permissions when appropriate.

✓ **Commenting & Tagging**

➢ Encourage collaborators to use comments for questions or notes.

➢ Tag files with status labels: "To Review," "Approved," "Final."

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4. Security Best Practices

✓ **Two-Factor Authentication (2FA)**

➢ Require 2FA on all accounts with organizer access.

✓ **Strong Passwords**

➢ Use a password manager and unique passwords for each collaborator.

✓ **Regular Backups**

➢ Periodically download a zip archive of the main folder for offline storage.

✓ **Access Audits**

➢ Monthly review of activity logs and permission settings.

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5. Maintenance & Updates

✓ **Ongoing Uploads**

➢ Add new documents (invoices, correspondence) promptly into the correct folder.

- ✓ **Folder Cleanup**

  - ➢ Every quarter, archive outdated drafts into an "Archive" subfolder.

- ✓ **Notification Settings**

  - ➢ Enable notifications for file uploads and comments to stay informed.

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