

# Boost Productivity and Improve Client Experience With Dawn Brolin's Folder Structure

Creating a well-organized, repeatable folder structure within your document management system automates the process of setting up clients and promotes consistency throughout your entire business. This makes it easier for your team to move the workflow forward and deliver better client experiences.

Below you'll find the exact folder structure expert Dawn Brolin, CPA, CFE, the CEO of Powerful Accounting, uses in her firm to boost her firm's productivity and efficiently serve clients.

## Bookkeeping Folder Structure

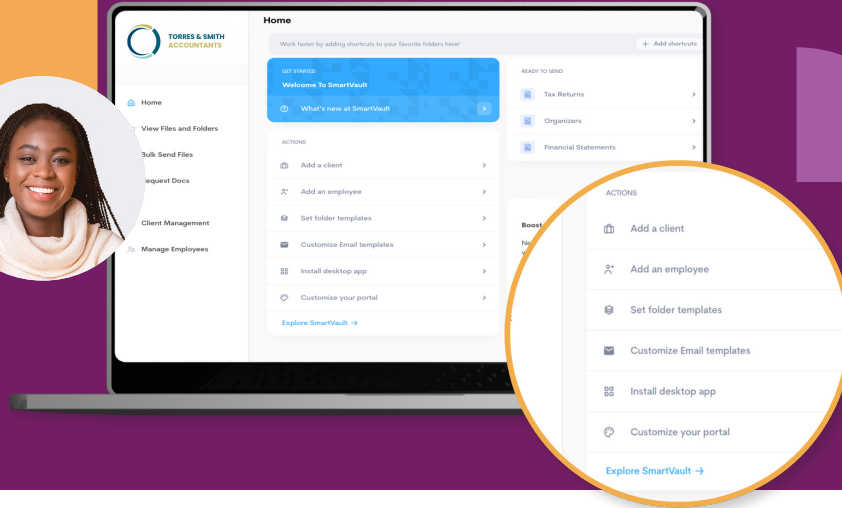
-  Accounting Summaries
-  Asset Acquisition & Disposal
  - ▶ Tax Year 2022
  - ▶ Tax Year 2021
-  Bank Statements
  - ▶ Bank Institution Name
    - ▶ 2022 Statements
    - ▶ 2021 Statements
-  Loan Documents & Statements
  - ▶ Funding Institution
-  Onboarding Docs & Registrations
-  Payroll Reports
-  Property Management Statements
-  Year End 1099 Processing
  - ▶ Tax Year 2022
  - ▶ W9's

## Tax Folder Structure

-  Client Uploads
-  Permanent File
  - ▶ Power of Attorney
  - ▶ Asset Acquisition & Disposal
  - ▶ IRS & State Correspondence
  - ▶ Onboarding & Registrations
-  Tax Year 2020
-  Tax Year 2021
-  Tax Year 2022
  - ▶ Client Organizer
  - ▶ Client Tax Returns
  - ▶ Firm Filing Copies - Tax Returns
  - ▶ Firm Source Documents
  - ▶ Tax Plan Reports
  - ▶ Tax Upload Folder

**Dawn Brolin uses SmartVault, an integrated document management system and secure client portal, to power her practice. See how SmartVault can work for you, too.**

[Schedule a Demo](#) 



## Document Management System and Client Portal

# Streamline Your Day, Collaborate Better with Clients, and Boost Customer Satisfaction



### Online Document Storage

Standardize and centralize your business documents with smart online document storage.



### Secure File Sharing

Make sharing files in the cloud easy and convenient, without compromising on security or compliance.



### Branded Client Portal

Give your clients a secure, easy, and professional way to collaborate with you on documents in the cloud.

“ I have been using SmartVault for almost 12 years, and it truly is the backbone of our tech stack, making delivering an amazing client experience super simple.”

Dawn Brolin, CPA, CFE; CEO of Powerful Accounting

Schedule a Demo 

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