



# Setting Up Your MASTER Folders

It's important you set up sub-folders for your practice management resources that are simple and self-explanatory so everyone knows where to find things. Here is an example of what you may have as main folders for your practice management.


## Client Files

- All clients by Last Name (ie. JONES\_Mary & Bob) 

## Practice Management

- All aspects of the client experience 


## Marketing

- Logos & Graphics 
- Introduction Kit
- Compliance Approvals
- Website
- Newsletter
- Other


## Operations

- Business Goals & Vision 
- Procedures Manual
- Team Management
- Team Technology
- Strategic Partners
- Great Future Ideas

## Accounting

- Reporting Summary 
- Revenue
- Expenses (by vendor or month)

## Licensing & Designations

- Anything else related to licensing & designations for your team 

## Other

- Anything else relevant to your team