

# File Organization Script for Legal Estate Planning Documents

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## 1. Project Overview

In this project, I developed a Python-based script to automate the sorting of estate planning documents into predefined categories. The goal was to help organize large sets of documents like wills, deeds, and financial records. The script identifies keywords in file contents and uses those to categorize the files into Real Estate, Financial, and Personal Property folders.

## 2. Tools & Technologies Used

- Python 3
- Libraries: os, shutil
- Future enhancements: regex for advanced keyword matching

## 3. Key Features

- Scans files in a source folder
- Reads file contents and identifies keywords
- Sorts files into folders based on keyword matches
- Preserves original files using a copy method

## 4. Workflow

1. Read file contents
2. Match keywords to category
3. Copy file to appropriate folder
4. Output status to terminal

## 5. Sample Results

Example input files:

- John\_House\_Will.txt → Real Estate

- Robert\_IRA\_Plan.txt → Financial
- David\_Jewelry\_Collection.txt → Personal Property

## 6. Future Enhancements

- Use regex for smarter keyword matching
- Add new categories (e.g., Health, Tax)
- Create a GUI interface
- Add more robust error handling

## Conclusion

This script showcases real-world legal tech problem solving using Python, automation, and keyword-based logic. It can be adapted for document-heavy legal environments to streamline file management.