

Org4life Genealogy Client Agreement

What you can expect from me:

Scope of Work

Where are we starting – with you and your parents? Do you know your four grandparents? If I can find your eight great-grand-parents easily enough, these four generations fit nicely on a one-page pedigree chart. Or, maybe you'd prefer a different starting point and project scope. I like to "go wide" in most cases, but if you already have one side of your family documented, or you are interested in solving a mystery, or learning more about a particular branch of your family, I can "focus" on a particular ancestor, location, or time period, or "go deep" (farther back in time) on a specific branch instead.

Deliverables

All genealogy clients will receive a report including the following sections:

- Summary cover letter
- Notes Specific to Your Project
- Next Steps & Resources
- If you have an Ancestry account (or want one)
- About Census Records
- About Misspelled Names, Conflicting Dates & Locations
- About the Women in Your Family
- Instructions for Creating a Family History Binder
- Attached Records (the documents that support my findings)

Method of Delivery

- If you have an active Ancestry account: I will give you my user name so you can find your tree that I have created on my account. From there you can examine all the work I have done and merge what you like with your own account.
- If you have a genealogy program on your computer: I will send you a GEDCOM file for uploading to your program.

- If you have NEITHER an active Ancestry account NOR a genealogy program on your computer: Unless we have made other arrangements, such as snail mailing, I will deposit your documents, in the form of .doc, .jpg and .pdf files, into a Dropbox folder and send you an invitation to view it and download the files from there. You do not need a Dropbox account of your own for this to work. (I can also set you up with an Ancestry guest account but, just so you know, I have had mixed results doing it that way.)

What I ask of you:

Your Insight

I will provide you with Family Group Sheets to get us started. Fill them in as best you can and return them to me. Vital records are optional, but helpful! If you have them handy (birth, death, marriage, military, naturalization, etc.), please provide copies. No piece of information about your family is too insignificant to mention. Sometimes I can find evidence that supports your family stories, and sometimes I find evidence to the contrary. Part of the fun is making connections between what you already know, and new information that I discover for you. Then we can discuss what else you'd like to learn about your family. I hope you enjoy the process!

Your Patience

Sometimes I get research ideas later (in a few days, or a week) that I did not have initially. And sometimes Ancestry.com (my primary, but by no means my only, research tool) provides hints later after "percolating" (my term) the information I input on your behalf. I may return your project to you in a week or two, or I may ask to keep it longer. Basically, the longer you let me keep your project the more results you will get for your investment! There will be no surprise extra charges, but I will definitely recommend possible additional projects!

Your Understanding

- You will almost surely find what you consider to be errors in spelling, dates, etc., in the information I sent you. Do not be dismayed! Along with your results, I will send you notes about how that happens and why you shouldn't be disappointed when you see it. Each project comes with a section called "About Misspelled Names, Conflicting Dates & Locations", and you can always ask me questions later.
- All research will be done using a variety of internet resources. Please keep in mind that, although millions of records have now been scanned and uploaded to the

internet, there are still many millions more that have not! There are still records that can only be found by visiting libraries, repositories, city halls, your ancestors' homes, cemeteries, etc. I may suggest sending away for a particular record that I think will be helpful, and there may be an additional cost involved in that. But you probably already realize that your package does not include travel!

- No matter how much information I find on your family, a genealogy project is never really finished! There is always another branch, another leaf. If I have completed our initial "project" (scope of work), I will make suggestions for additional research that you can pursue on your own, or you can ask me to help you further for an additional project fee.
- I will let you know how certain I am of my conclusions. Although my citations are often implied or informal (such as when I provide an image of a birth certificate rather than a written citation), I otherwise follow the [Genealogical Proof Standard](#). Keep in mind that the way we interpret all data today is subject to change as new information comes to light.
- It is possible that I will find nothing at all regarding the particular relative, or branch of the family, that interests you. That *usually* doesn't mean nothing exists, and that nothing will *ever* be found (although that's certainly possible). It might just mean that it is not yet available online. Or, it is not easily findable for any number of reasons, which we can discuss. If this happens, I will often make up for it by finding more than you expected about a different relative, or branch of the family. Adoptions and name changes are common obstacles. Sometimes I can break through those brick walls (or, as we say here in New Mexico, adobe walls) and sometimes I can't.

Thank you!

I can't wait to get started!



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