



**Name**

Address, Telephone, Fax, email

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Professional genealogist (certified) specializing in researching

\_\_\_\_\_ [list specialties] \_\_\_\_\_

**SERVICES AND FEES**

Research Service Includes

- Review of information provided by client
- Formulation of work plan
- Research and analysis
- Written report of findings, including negative findings
- Recommendations for future research
- Copies, transcriptions, or abstracts of documents, as appropriate
- Evaluation of documents
- Translations of documents (optional; additional fee)

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Retainer Fee

\$\_\_ for two-hour minimum, payable in advance;  
other charges will be billed upon completion  
( )

Hourly Fee

\$\_\_ per additional hour for services described above.  
Research time includes travel and telephone and email consultations with client.  
Negative findings and unsuccessful searches are charged.

Reimbursable Expenses

Postage, photocopies, parking, long-distance telephone calls and faxes,  
computer charges, microfilm rental, other incidental expenses;  
travel expenses at the rate authorized by the IRS



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### GENEALOGY SEARCH REQUEST

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_ FAX \_\_\_\_\_ EMAIL \_\_\_\_\_

**Please provide the following information, either on this form or on attached sheet(s):**

NAME / NAMES to be researched (in order of priority): \_\_\_\_\_

RESEARCH GOAL(S): \_\_\_\_\_

LIMITATIONS (time, collateral lines, historical period, etc.): \_\_\_\_\_

**FAMILY INFORMATION:** To avoid being charged for duplicate work, please provide whatever information you have already compiled on the person or family to be researched. This should include family group sheets, ancestor / descendant charts, religious affiliations, known places of residence, dates and places of birth, marriage, death and other significant life events, sibling information, etc.

**RECORDS:** Include copies of records you have found (census, land, church, vital records etc.).

*AGREEMENT: Enclosed is a check for the initial retainer fee of \$\_\_\_\_ for a two-hour research block. Additional \_\_\_\_\_ hours are authorized. Balance for additional time and / or reimbursable expenses are payable upon completion of the research. It is understood that time leading to negative findings is also charged. I also hereby give permission for the use of research findings in lectures, published materials, and in the researcher's portfolio submitted periodically to the Board for Certification of Genealogists for renewal of certification.*

**SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_