

WHETSTONE BROOK GENEALOGY

GENEALOGICAL AND OTHER RESEARCH SERVICES CONTRACT FOR GENEALOGICAL SERVICES

I _____ (“Client”) engage the genealogical research services of **Jerry Carbone, Whetstone Brook Genealogy**, (“Researcher”), **45 Whetstone Drive, Brattleboro, 05301**, to conduct genealogical research on my behalf, for an amount not to exceed \$ _____ as per the following **Research Question(s)** on page 2 that were previously discussed with the Researcher.

In addition, Client has provided the Researcher all pertinent information in my possession relating to the **Research Question(s)**. The Researcher will follow elements of the *Genealogical Proof Standard*¹ to perform a reasonably exhaustive search, but the Client acknowledges that the Researcher can make no guarantees regarding what information, if any, may be found, within the time allotted by Client.

Researcher agrees to provide Client a report answering the **Research Question(s)** identified on page 2 covering all relevant sources viewed, downloaded, or photocopied during the research, with an analysis of said evidence. The **Research Report**, fully footnoted, will contain sections of *Summary of Findings*, a *Research Log* noting research results, both positive and negative, and *Suggestions for Further Research*.

An electronic folder with a shared link will contain all of the source images connected to the footnotes in the **Research Report**. The **Report**, along with a link to the source images, will be emailed to the Client as a pdf, unless the Client prefers hardcopy sent via US Mail.

All time will be documented using timekeeper software and a report of time consumed and expenses incurred will be included with an invoice. The **Research Report** will be sent after a reasonable amount of time after receipt of the final payment from the Client.

Researcher retains the right to use the information in the report for publications and lectures unless these specific rights are otherwise negotiated between Researcher and Client.

Client authorizes Researcher to obtain vital records as may be necessary to establish and identify kinship related to the attached research goals. A photocopy of this authorization shall have the same force and effect as the original.

The Researcher's work will be charged as follows: **1.** \$30.00 per hour. **2.** A retainer fee of \$500 is requested to review previous research, refine research questions, create a research plan, and begin evidence collection, analysis, and report writing. **3.** Any out-of-pocket costs including but not limited to photocopies, postage and handling, travel, repository entrance fees, database fees and the like. Any unused portion of the retainer will be returned to the Client. The Client will approve in advance any fee of more than \$25.

The Researcher is a member of the Association of Professional Genealogists, and adheres to the APG, *Code of Ethics and Professional Practices*.²

Signature of Researcher _____ Date _____

Signature of Client _____ Date _____

¹ Board for Certification of Genealogists, *Genealogy Standards-50th Anniversary Edition*, (New York: Ancestry.com, 2014), p. 1-3; provided to client upon request.

² <https://www.apgen.org/ethics/index.html>

