

Rondina P. Muncy
Genealogical Research

Ancestral Analysis

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Jane Doe
123 Oakridge Street
Dearing, Texas 12345

Dear Jane,

You have requested that I undertake professional genealogical services for you. This letter describes the agreement between us regarding these services. If you agree with the terms, please sign both copies in the space provided at the end and return the white copy to me.

I undertake to conduct a search for the origins and genealogical history of John Doe of Willis County, Texas. John Doe is your third great-grandfather. This research will require the compilation of documents and sources that have already been acquired through related research by family members. Reports will be broken down by location as John is traced backwards in time. They will cite all sources researched and include copies of material with positive results. Allied and collateral families may also be researched in an effort to trace John.

A retainer fee of three hundred and fifty (350) dollars is required. This retainer includes up to ten (10) hours of time before an hourly fee of thirty-five (35) dollars is charged. The retainer will be used to evaluate previous research and organize a research plan to address a *specific* research problem. Any funds not used toward evaluating your current information and creating a plan will be applied to further work or returned to you.

Additional costs would include postage, photocopies, mileage (at the current rate authorized by the IRS), parking and microfilm/fiche rental.

Occasionally, work must be sub-contracted out because of inaccessibility to a repository. Work will be undertaken by any other contractor *only with your verbal permission*. No other contractor will *analyze* the validity of any record or the information contained in any record for the purposes of this research.

I will perform this work as an independent contractor in accordance with prevailing professional genealogical standards, including the Code of Ethics of the Association of Professional Genealogists, the Code of Ethics and Conduct adopted by the Board for Certification of Genealogists, and the Genealogical Standards recommended by the National Genealogical Society. Copies of these are attached.

I hold all information you provide that is not already a matter of public record or knowledge as confidential. No information is shared with any third party except the Board for Genealogical Certification as described in the following paragraph, unless I have *written permission*.

By agreement with this contract, you allow me to submit all final products to the Board for Genealogical Certification for independent and confidential review for certification purposes. A separate letter of agreement is attached in duplicate.

You agree that if you distribute to others or publish any information taken from reports/products produced for you, including my findings and conclusions, you will report them accurately and include any qualifiers (i.e., *possible, probably, presumed to be*) when accompanying a conclusion, and you will credit my report/product as the source with the exception of public information.

The *creative authorship* of the report/product is copyrighted; the informational content is not. Information obtained from a report/product can be used at will, for instance, in a family history or placed on the Internet. However, the reports/products themselves *and the wording therein* are protected by copyright under the 1978 *Act for the General Revision of the Copyright Law, U.S. Code, Title 17*.

This letter reflects the full scope of our agreement and replaces any earlier, tentative commitments by either of us. Any changes to this contract will be effective only if they are also made in writing.

I am looking forward to researching the origins of John Doe and discovering whether oral tradition about this family bears truth.

Sincerely,

Rondina P. Muncy

Date

Accepted by:

Client

Date

Attachments:

APG Code of Ethics

BCG Code of Ethics and Conduct

NGS Genealogical Standards

Letter of Permission