

Missing Pieces Genealogy, LLC

Terry Lewis, Genealogist

PO Box 400092 ♦ Hartford, CT 06140 ♦ 860 597 2745

GENEALOGICAL RESEARCH SERVICES AGREEMENT

Client's Agreement

I, _____ ("Client"), wish to engage the services of Terry Lewis of Missing Pieces Genealogy, LLC ("Genealogist") to assist me in (please state the objective or goal of the research):

(attach separate page if needed to complete explanation)

I agree:

1. To facilitate the Genealogist's research and avoid duplication of efforts, I will provide a copy of all previous research notes, charts and tables, documents, and analyses whether performed by myself or another person that are relevant to the research for which I am commissioning the Genealogist. This includes research information on my direct ancestor(s) and their siblings.
2. To inform Genealogist of any sensitive information or anything to be held confidentially.
3. To the ten-hour minimum (10) for all projects at \$40/hour. This time includes review of previous research, creating a research plan, executing the research plan, analyzing evidence and preparing a fully-cited report. Most projects typically consume at least 10 hours; if the project is completed under the time allotted, a refund will be made of unused funds, less any reimbursable expenses.
4. That despite reasonably exhaustive research, there are times when a research objective cannot be met and that this agreement is not a guarantee of the desired result.
5. That reimbursable expenses may include, but are not limited to: repository access fees, copy costs, postage, parking at research facilities. Any travel costs beyond a reasonable drive to a repository will be discussed before incurring. Mileage will be reimbursed at the current IRS rate.
6. I agree to pay 50% along with all previous research material noted in #1 in order for the Genealogist to begin work. The balance will be paid when the final report is completed.
7. I understand that the Genealogist has occasion to publish research, use research in cases studies in lectures/presentations or for her renewal application portfolio. Sensitive information will not be included. (Please mark preference) ___ I grant permission to use the research (respecting the 72-year privacy rule) in these instances. ___ I do NOT grant permission for future use of the research.
8. I agree that I will not publish the research report in any form (beyond adding to my own published family tree, e.g. on Ancestry) without prior written consent of the Genealogist.
9. Should any dispute arise out of this agreement, I agree to be bound by the arbitration services of the Association of Professional Genealogists.

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Terry Lewis, Genealogist

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Genealogist's Agreement

I, Terry Lewis of Missing Pieces Genealogy, LLC ("Genealogist"), agree to the following:

1. I am an independent contractor, commissioned by the Client to perform genealogical research and produce a thoroughly documented research report.
2. I will follow the professional standards of the genealogy community, including the Code of Ethics the Association for Professional Genealogists and the Code of Ethics and Conduct adopted by the Board for Certification of Genealogists. Copies of these standards are available upon request.
3. My hourly rate of \$40 will be charged for research review, telephone consultations, creating a research plan, executing the plan, analyzing evidence and writing a thoroughly documented research report. The initial agreement is for a minimum of ten hours' work. Should the Genealogist complete the work in fewer than the minimum number of hours, a refund will be made, less any actual expenses. An invoice will be provided for all expenses.
4. Reimbursable expenses may include, but are not limited to copy costs, microfilm copies, parking, postage, travel and miscellaneous expenses. Travel by car outside Hartford County will be reimbursed at the current IRS rate. There may be a need to hire a genealogist located near a repository to retrieve a document or a translator for foreign documents. Should this need arise, the Genealogist will contact the Client to explain the need and secure authorization prior.
5. Work will begin within one week of receipt of the deposit named above and receipt of all previous research material as detailed above.
6. I will hold in confidence any information provided by the client of a sensitive nature (which s/he has defined as such) and on living relatives, any information that could not be discovered by a public resource or information that the Client has not disclosed to anyone else, unless compelled by a Court of Law.
7. Once evidence has been gathered and analyzed, a research report will be written which will include all the resources consulted, analysis (including negative findings), my conclusions, suggestions for next steps and a copy of all documents found. The report will be delivered to the Client electronically as a .PDF file. A paper copy can be provided for a nominal cost.
8. In the instance that the research objective cannot be met, a detailed account of resources consulted and evaluation of evidence to support why the objective cannot be met will be produced.
9. Should any dispute arise out of this agreement, I agree to be bound by the arbitration services of the Association of Professional Genealogists.

Client Signature

Date

Missing Pieces Genealogy

Date