

Genealogical Research Agreement

Katherine R. Willson, Genealogy & History Researcher • SocialMediaGenealogy.com

Client Name: _____

Client Email: _____

Date: _____

This agreement is entered into between Katherine R. Willson (“Researcher”) and the above-named client for professional genealogical research services.

PROJECT SCOPE

[Description of research to be conducted]

Client Initials: _____

SUPPORTING DOCUMENTATION

The client affirms that all materials currently in their possession that may be relevant to this research, including documents, letters, journals, photographs, and similar items, have been made available to Katherine R. Willson. Failure to provide relevant materials may increase research time and costs and may affect the completeness of the research findings. Time spent identifying, locating, obtaining, and reviewing previously unshared materials is billable.

Client Initials: _____

HOURLY RATE & BILLABLE TASKS

Katherine R. Willson will provide genealogical research services for up to **[number of hours]** at a rate of \$115.00 USD per hour. Research will begin upon receipt of this signed agreement and a retainer equal to 50% of the estimated project cost.

Billable time includes the initial client consultation (in person, if applicable), client communications by email, research, analysis, correspondence with repositories and other parties, report writing, and other tasks directly related to the project. The client agrees to reimburse reasonable expenses incurred in the course of the project, including repository copying fees, record-ordering fees, parking fees, admission fees, postage, and similar costs. Any extraordinary expense not reasonably anticipated as part of the research project will be discussed with the client before being incurred.

Client Initials: _____

ESTIMATED COST AND RETAINER AMOUNT

The estimated cost of this project will not exceed [dollar amount] without the client's prior approval. A retainer of [dollar amount] is due before research begins.

Client Initials: _____

PAYMENT

Genealogical research is inherently uncertain, and no guarantee can be made that the client's research question will be fully answered or that the desired outcome will be achieved. Katherine R. Willson agrees to apply her professional expertise and make diligent use of available records, resources, and research methods in pursuit of the client's research goals. The client acknowledges that payment is for professional time, services, and expertise, regardless of the results obtained.

A retainer is due before research begins. The remaining balance is due within fourteen (14) days of the client's receipt of the research report and invoice, which will be provided upon completion of the agreed-upon research hours.

Payment may be made by check, PayPal, or Venmo. Payment instructions will be provided with the invoice. The client is responsible for any fees associated with the selected payment method. Credit card payments outside of PayPal or Venmo are not accepted.

Client Initials: _____

CORRESPONDENCE

Initial consultations are generally conducted by email. At the researcher's discretion, an initial consultation may be conducted in person. Following the initial consultation, all project-related communications will be conducted by email to maintain a complete written record of correspondence.

Depending on the nature of the research and response times from archives, libraries, and other repositories, individual phases of the project may take several weeks to complete regardless of the number of research hours authorized. The client will receive progress updates by email approximately every three (3) to four (4) weeks.

Client Initials: _____

CODE OF ETHICS & GENEALOGICAL STANDARDS

Katherine R. Willson agrees to conduct all research in accordance with the ethical standards and professional practices established by the National Genealogical Society, the Association of Professional Genealogists, and the Board for Certification of Genealogists.

REPORT OF FINDINGS

Upon completion of the agreed-upon research hours, Katherine R. Willson will provide the client with a written research report detailing the work performed, findings obtained, sources consulted, and recommendations for future research, where appropriate.

Client Initials: _____

USE OF RESEARCH FINDINGS

Upon payment in full, the client may use the report and research findings for personal, educational, genealogical, and family-history purposes. Katherine R. Willson retains the right to use the research methods, analysis, findings, and conclusions developed during the course of the project in future publications, presentations, educational materials, and other professional activities, provided that personally identifying information about living individuals is omitted unless permission has been granted.

Client Initials: _____

TERMINATION

Either party may terminate this agreement in writing at any time. The client remains responsible for payment of all billable time and approved expenses incurred prior to termination.

Client Initials: _____

By signing below, both parties acknowledge that they have read, understood, and agree to the terms of this agreement. Electronic signatures and scanned copies of signed documents shall be considered equivalent to original signatures for all purposes.

Client Signature: _____ Date: _____

Researcher Signature: _____ Date: _____