

Contract letter

Dear Client:

You have asked me to undertake professional genealogical services for you. This letter, with the accompanying Scope of Services, 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 one to me.

Our agreement will become effective when I have received (a) a copy of this letter, with your signature accepting it; and (b) payment of a research retainer. The **initial \$60 fee** is not refundable but will include up to five hours of work before you will be charged a fee of **\$17.00/hour** plus out-of-pocket costs including but not limited to photocopies, postage and handling, repository entrance fees, travel and lodging (when reasonable, necessary and agreed upon in advance), database fees and the like. You have authorized a maximum of five hours for this initial assignment, as outlined in the attached Scope of Services, and will authorize any additional time in writing.

I will perform this work as an independent contractor in accordance with prevailing professional standards in genealogy, including the Code of Ethics adopted by the Board for Certification of Genealogists, and the Standards recommended by the National Genealogical Society, copies of which can be provided to you at your request. You understand that I can make no guarantee regarding what information, if any, may be found, and that conclusions are based on weight of available evidence and that absolute proof of genealogical relationships is usually not possible.

After I have analyzed your problem, completed the initial research, and reached my conclusions, I will provide you with a summary report of my findings, along with suggestions for further research. Should you wish me to continue the research, it will be charged at an hourly rate, subject to your prior written consent, in increments of no less than three hours. Requests for additional work in excess of **nine** hours will require a 50% advance deposit to initiate work. At the completion of the project, a fully documented, detailed report describing my findings and the basis for my conclusions, along with copies of all relevant documents, will be provided digitally and/or in print form upon receipt of payment in full.

I will hold confidential any information you provide that is not already a matter of public record or public knowledge. I will treat with discretion, even if they are already matters of public record, issues that concern living persons, their parents, or immediate families. Otherwise, I retain the right to make further use of the results of this work, including publication in articles or books, with acknowledgement of your sponsorship of the research, unless you request anonymity.

You agree that if you distribute to others or publish any information taken from my report, including my findings and conclusions, you will report them accurately, you will include any qualifiers (for example, the words *probable* or *possible*, when accompanying a conclusion), and you will credit my report as the source.

This letter and the accompanying Scope of Services reflect the full scope of our agreement and replace any earlier, tentative commitments made by either of us. Any changes will be effective only if they are also made in writing.

Thank you for this opportunity to be of service.

Erin Brown

The Family Shrubbery

Client Signature: _____

Date: _____

Researcher Signature: _____

Date: _____

Scope of Services

Client Name:

Best contact info (phone, email, text):

Choose the service which you are requesting:

- Single ancestor research
- Paternal/Maternal line genealogies
- History of a hometown (in family context)
- Brick Wall research
- Organizational assistance (digitizing, scanning, filing, web-use)

Description of work provided below (additional page may be added if required):

Client signature: _____

Date: _____

Researcher signature: _____

Date: _____