

Patricia Bracelin - Virtual Office Assistant

459 Regent Street E. Hawkesbury, ON K6A 1G2

Telephone: 613-632-3467 Fax: 613-632-3467 (call first) E-mail: pbracelin@sympatico.ca <http://pbvoass.weebly.com>

REQUEST FOR GENEALOGICAL RESEARCH

Your Name: _____ Date: _____

Address: _____

City/Town: _____ Province: _____ Postal Code: _____

Telephone: _____ Fax: _____ Email: _____

How did you hear about my services? _____

Is this project to be a gift? YES NO By what date would you like to have your Final Product? _____

I am requesting the assistance of Patricia Bracelin to research and complete my family's Genealogical Family Tree. I give total authority to Patricia to search all Ancestry databases to find all relevant information pertaining to my family's history.

** It is strongly recommended that you contract for a minimum of 25 hours for a 4 generation Family Tree, or for extended research.*

I prefer to:

- Contract for this number of hours (*circle one*): 10 15 20 25 30 Other Hours _____ Open-ended _____
- Give a "Security Deposit" (*half the total*) in the amount of \$ _____ with initial request (*Please Pay by PayPal or make a certified check or Money Order payable to Patricia Bracelin*). Please send PayPal payments to pbracelin@sympatico.ca
- Pay the total amount upon completion of the Family Tree.

I have filled out the Genealogy Application Form to the best of my knowledge and have attached it to this Request.

** Please note that research will be performed in the order received. However, I Patricia Bracelin reserve the right to put forth any high priority requests should the final product be necessary to be completed by a certain date for gift giving purposes. I will complete any and all requests as accurately and as quickly as possible (*depending on your request and priority*) so that you may receive the "final product" in a timely fashion. I will keep you up-to-date by email or phone regarding the status of your Family Tree. If you send a GEDCOM file of your genealogy to date via disk or Internet that would be helpful. I reserve the right to duplicate research sent to me if I need to examine that record for more detail.*

**If it takes a shorter period of time than you have requested for the research, any unused time (*Security Deposit if any was given*) will be reimbursed to you, or the total amount will be adjusted accordingly. If I need more time, I will inform you and ask for your permission before proceeding. I will proceed only if you authorize additional work and payment by telephone, mail or email.*

I. INTRODUCTION

A. You have asked me to perform professional genealogical research for you. This agreement, the Application for Genealogical Research and the accompanying Service Description, describe the agreement between us regarding that service. If you agree with these terms and the attached Service Description, please sign this, make a copy for yourself, and return it to me with your research request.

B. I will undertake to perform research for you to the extent you have requested, using your goals and priority as guides. I will perform as an independent contractor in accordance with prevailing professional standards in genealogy, including complete confidentiality and will use my judgment to direct the research in the most productive manner for the achievement of your goals.

C. Because I do not wish to duplicate work already performed, you will supply me with information already obtained to the extent possible. I do reserve the right to duplicate some research already accomplished if I feel the attending conclusions or that research are incomplete or incorrect. Our agreement will become effective when I have received your material, a copy of this Request with the Agreement Form with your signature accepting it, and the Application Form.

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II. REPORTING

- A. After I receive your materials I will analyze them and begin entering the information into Family Tree Maker 2009, research is conducted through a paid subscription with Ancestry.ca World edition. Once research has been completed I will have you review a copy of your pedigree chart for your approval. Once approved, I will organize and prepare your "final product" which will include a copy of all vital records, media files, and photos (*if any*) and present it to you along with an 11 x 17 inch Pedigree Chart. Simple requests may take much less time and will not have any formal report explaining them.
- B. I strive to use original sources (such as vital records) in gathering evidence of facts. However, because of financial or time constraints, you may be satisfied with derivative evidence (such as compiled sources, (i.e. genealogies, town histories, etc.). The customer agrees that I will use my judgment, based on time constraints, to gather the best evidence possible for the stated goals within the time allowed.
- C. I will strive to get your report to you as quickly as possible. My present goal is to return a report to you within 60 days or sooner. Occasionally factors may lengthen that time, **sometimes 90 days and longer**, but rest assured that I do my best to shorten response time, because I know how anxious you are for the data! I will attempt to contact you when events interfere with the timeliness of reporting, and I appreciate your patience with the process. I believe the professional quality of my research and the reports will more than please you.

III. CHARGES

- A. A fee is charged of \$10.00 per hour. If you are requesting a time constraint, please describe: _____ hours for \$_____. (*Example: A 4-generation family tree takes approximately 25 hours to complete for a total of \$250.00*) The fee covers research and all related activities including reporting, analysis, data entry, reading and preparation of the final product. Any Security Deposit given is non-refundable once research has begun.
- B. I do not charge tax so you never have to worry about paying for more than the agreed upon amount.
- C. The cost of having the booklet assembled and the 11x17 inch Pedigree Chart are all included in the final price.
- D. Long distance charges (*if any and subject to your approval*), may apply and will be billed at cost. These charges will be added to your invoice.
- E. I do not ask for a Security Deposit, however if you wish to give a Security Deposit (*half of the estimated total*), you may do so. Sorry, security deposits are non-refundable after I commence work.
- F. The client will pay the remaining balance or total amount due at the time of receiving their completed Family Tree package.

IV. RESEARCH

- A. My primary research area is the nineteenth and twentieth centuries. Today, because of the Internet, I am able to perform a limited amount of work across the country. But primary research in an area other than Canada or the US may require more time than pre-determined. Records for your descendants up to your grandparents may be difficult to acquire so if you have any originals or copies of them, it would be best to use them and not waste time searching online so that I can dedicate the time to your ancestors
- B. When you contract for a fixed number of hours, approximately half are for repository research and half for the analysis and report completion. I strongly urge you to consider a minimum of twenty-five hours initially and thirty-five hours or more for lengthy research. However, I understand that there may be reasons you wish to begin with fewer hours.
- C. When I perform research, you become the owner of that research. I retain a copyright to the report and progress report. Information you supply to me that is not a matter of public record will be held in confidence. Occasionally I would like to submit samples of my research as examples of my work. If you authorize me to submit your research as an example or for possible publication, please initial the appropriate spaces below authorizing me to do so.
- D. I retain the copyright to the report and the manner in which I have expressed the information in it. You may make a limited number of personal copies of the copyrighted report, but you agree that if you make limited distribution of anything that includes my research, in whole or in part, you will report it accurately and credit me as the source.

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V. MISUNDERSTANDINGS

We both agree that if any dispute arises out of this agreement, we will make every attempt to settle it between ourselves. If we cannot come to an agreement, I will reimburse any Security Deposit made (*if one was initially made*), and return all material provided by yourself at the time of receiving your application. I am grateful for the opportunity to be of service. I hope that you, too, will be pleased with my research and reports.

Sincerely,

Patricia Bracelin

I accept this agreement:

Client Signature

Date

You may use my materials for professional review:

Initialed

In addition, you may use my research in personal publications, provided you credit me as the sponsor of your research.

Initialed

Please sign this copy and return it to me. Please keep a copy for your records.

- Perform careful, accurate and documented genealogical research to fulfill the customer's stated goals.
- Utilize the highest technology and most extensive means of acquiring genealogical data within my reach, assuring the best results for your family history.
- Deliver the best quality professional reports that will become treasured family documents in themselves.
- Maintain customer satisfaction through quality workmanship and reasonable costs.
- Keep myself accessible to the customer at all times.

FOR YOUR PEACE OF MIND:

All research and private information will be kept strictly confidential and will not be given out to anyone without first obtaining your explicit consent. All information, including any and all photocopied documents and/or photos will be returned to you along with a list of documents obtained at the time of application received. All files scanned or found and saved during the time of research will be saved on a "Memory Key" provided by you or purchased by myself with your approval also at the time of application received. Any and all purchases incurred by myself with your consent will be added to you final billing.

_____ Initials please.

Please return the completed "Request for Genealogical Research" form to the mailing address listed at the top of the page, or you can Fax or Email it to me at the number or email address listed above. Thank you.