

This client contract between **<CLIENT NAME> (<CLIENT EMAIL>)** and **Katherine R. Willson (<RESEARCHER EMAIL>)** is for the authorization to begin research in an attempt to answer the following question, using as reference the client's email sent on **<EMAIL DATE>**:

<CLIENT QUESTION>

SUPPORTING DOCUMENTATION

Client confirms that all pertinent materials in his/her possession that may assist in answering these questions (documents, letters, journals, photos, etc.) have already been added to his/her Ancestry.com tree, or have been photocopied or digitized and shared with me. If no materials are added to the Ancestry.com tree or shared with me, I will proceed with the assumption that such materials do not exist, or are not in the possession of client.

HOURLY RATE & BILLABLE TASKS

I will work as an independent contractor for **no more than <NUMBER> hours** at the rate of \$85 (eighty-five) USD per hour following receipt of this contract signed by both client and researcher, and following receipt of a retainer for 50% of the estimated cost for the project. The estimated cost will be **<ESTIMATED PROJECT COST>** so the retainer amount to be paid before research will begin is **<RETAINER AMOUNT>**.

Billable tasks will include all time spent on research, analysis, correspondence, and report writing. Client will be notified in advance of any additional billable costs that may include round-trip mileage to research facilities (at the current 2022 IRS reimbursable mileage rate of \$0.625 USD per mile), parking fees, tolls, photocopying costs, document copy fees, and research fees charged by any facility.

It may be impossible for me to answer the client's research question in full within the allotted agreed-upon hours for this project, and if this is the case, I will contact the client to determine next steps.

PAYMENT

I cannot guarantee that I can successfully answer the client's research question, as there may be limitations such as an absence of records due to the time period, record loss from floods or fires, etc. I can guarantee that I will attempt to answer the client's research question using my full and advanced research skills, as well as all tools and resources available to me. Client agrees to pay for my time and research expertise regardless of whether I am able to answer the client's research question.

Payment of the retainer will be expected prior to the start of any research. Payment of the remaining balance will be expected within 15 (fifteen) days of receipt of the client report and invoice, which will be sent following the completion of the agreed-upon hours of work.

Payment options include paying by check or via electronic payment apps such as PayPal, Venmo, or CashApp (see top of page 1 for account usernames). The client shall pay any and all applicable fees as a result of any payment method. Credit card payments outside of electronic payment apps are not accepted.

Client initials for Page 1: _____

CORRESPONDENCE

All client correspondence will be done via email to ensure everything is in writing. It may take weeks or even months to conclude a project, regardless of how few hours are initially requested and approved, but I will update the client via email approximately every 4 (four) weeks.

ONLINE QUERIES

I may attempt to locate additional people researching the client's same family lines in the event that they may have documents or photos that answer the client's research questions. To do that, I may post details of the client's deceased ancestors to websites as part of the query process. However, I will not identify the client by name, location, or using any other identifiable information unless the client specifically asks me to do so.

CODE OF ETHICS & GENEALOGICAL STANDARDS

As a member of both the Association of Professional Genealogists and the National Genealogical Society, I will adhere to the Code of Ethics and to the Standards set forth by these organizations.

REPORT OF FINDINGS

I will send the client an email at the conclusion of the agreed-upon billable hours that contains a detailed listing of my findings and to discuss next steps, including whether to proceed to a second phase of the project.

I agree with the above:

Client's Signature & Date:

Date

Researcher's Signature & Date:

Date