

Valerie A. G. Stern, CG<sup>SM</sup>  
63 Wolfpit Road Sussex, NJ 07461  
(973) 875-9505  
www.allouryesterdays.org

[Wolawol@gmail.com](mailto:Wolawol@gmail.com)

You have asked me to undertake professional genealogical services for you. This letter, with the accompanying schedule of fees and expenses, describes the agreement between us regarding these. If you agree with the terms, please sign both copies in the space provided at the end and return one to me.

I will undertake to [*description of problem, scope of work and applicable time restraints.*]

SO THAT I WILL NOT DUPLICATE WORK ALREADY DONE, you will provide me with the information you already have on the matter, including copies of reports or summaries of previous research touching on the problem, copies of significant records, and notes on sources or collections already searched.

Our agreement will become effective, and I will begin work when I have received (a) your information (described in above paragraph); (b) a copy of this contract, with your signature accepting it; and (c) your check for the initial retainer of \$200. This retainer includes up to eight (8) hours of time, used to evaluate previous research and prepare a research plan to address the specific research problem. Any funds not used toward evaluating your current information and creating a plan will be applied to further work (approved by you) or returned to you.

Additional costs would include postage, photocopies, mileage (at the current rate authorized by the IRS), parking and microfilm/fiche rental.

If payment is a personal check, I will wait until the check has cleared your bank. A cashier's check or money order will not require any wait time.

Occasionally, work must be sub-contracted out because of inaccessibility to a repository. An outside contractor will undertake work only with your verbal permission. No other contractor will analyze the validity of any information contained in any record for the purposes of this research.

I will perform this work as an independent contractor in accordance with prevailing professional standards in genealogy, including the Code of Ethics of the Association of Professional Genealogists, the Code of Ethics adopted by the Board for Certification of Genealogists and the Standards recommended by the National Genealogical Society, copies of which are attached.

After I have analyzed your problem, completed the research, and reached my conclusions, I will provide you with [*a documented report describing my findings*]

Valerie A. G. Stern, CG<sup>SM</sup>  
63 Wolfpit Road Sussex, NJ 07461  
(973) 875-9505  
www.allouryesterdays.org

[Wolawol@gmail.com](mailto:Wolawol@gmail.com)

*and the basis for my conclusions] and/or [copies of relevant documents with full source citations].*

Please understand that no qualified, ethical genealogist can or will guarantee results. I will try my best to find what you want to know within the time frame provided, but sometimes the best efforts fail. Specific results won't be known until research is conducted and completed. There is no guarantee that any professional will be able to locate new information about your ancestors. It is important to re-member that you are paying a professional for his or her time and expertise.

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, as well as any items you specifically note as sensitive. Otherwise, I retain the right to make further use of the results of work done at your request, including publication in articles or books, with acknowledgment of your sponsorship of the research, unless you request anonymity. However, I will not accept fees to provide these results to other interested persons, but will, with your consent, refer them to you for the information and allow you to determine the terms under which you may decide to share it.

You agree that if you distribute to others or publish or post on the internet any information taken from my report, including my findings and conclusions, you will report them accurately, **you will include any qualifiers** (such as the words *probable* or *possible*) and you will credit my report as the source. 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 as a "fair use" of the report, but you agree that you will not otherwise publish or make multiple copies of the report without my written permission.

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

Thank you for the opportunity to be of service.

Sincerely yours,

Valerie Stern  
Certified Genealogist

Valerie A. G. Stern, CG<sup>SM</sup>  
63 Wolfpit Road Sussex, NJ 07461  
(973) 875-9505  
www.allouryesterdays.org

Wolawol@gmail.com

ACCEPTED:

---

Client

---

Date