



## The Past Lane

Cheryl Brown Abernathy CG®  
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*DATE*

*ADDRESS*

Dear *Name*:

You have asked that I undertake professional genealogical services for you. This letter, with the accompanying Schedule of Fees and Expenses, describes the agreement between us regarding these services.

If you agree with the terms, I will [*statement of what I will do*].

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) that material; (b) a copy of this letter, with your signature accepting it; and (c) your check for the initial retainer of **a minimum of \$350**. This retainer is not refundable but will included up to two hours of work before you will be charged an hourly fee. You have authorized a maximum of \_\_\_\_\_ hours for this initial assignment, in accordance with the attached schedule of fees and expenses, and will authorized 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 of the Association of Professional Genealogists, the Code of Ethics adopted by the Board of Certification of Genealogists, and the Standards recommended by the National Genealogical Society.

After I have analyzed your problem, completed the research, and reached my conclusions, I will provide you with a documented report describing my findings and basis of my conclusions along with copies relevant documents.

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 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.

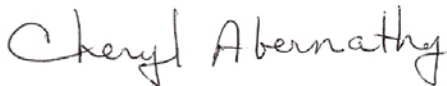
You agree that if you distribute to others or publish any information taken from my report, including my findings and conclusions, you will report them accurately, you will include any qualifiers (for example, the words *probably* or *possible*, when accompanying a conclusion), and you will credit my 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 copyrighted report, but you agree that you will not otherwise publish or make multiple copies of the report without my written permission.

We both agree that if any dispute arises out of this agreement, we will use the mediation services of the Association of Professional Genealogists and accept as final and binding on both of us that decision, and we both consent to the entry of the decision as a final judgment in any court that may have jurisdiction over either of us.

This summary 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,



Cheryl Brown Abernathy

Accepted by:

\_\_\_\_\_  
*NAME*

\_\_\_\_\_  
Date

## **Schedule of Fees**

\$35/hour Includes initial reviewing of submitted information, developing a research plan, research and writing the report.

\$.10 to .25 Copy charge – varies with library / repository.

\$.57/mile Mileage outside my usual research area.