

Genealogy Basics – How a Client Should Prepare for a Genealogy Consultation

By Joe Petrie

BACKGROUND:

The genesis of this article was a consultation with Regina, a high school classmate who was vacationing on the same street in our condo community in Naples Florida in March 2016. Regina was well prepared. She had a priority list that started with her father (Alfred) and his older sister (Florence). Both children were born in Boston. Their parents were immigrants from Italy. Regina was unable to get birth certificates for her father and her aunt. (I told her that most genealogy databases had images of the registers but did not have images of birth certificates etc.)

After our session, Regina had the required information to purchase the birth certificates. For her father, she learned that the person who recorded her father's birth had recorded the surname as ending in TI and not DI. Also, her father's given name was recorded as an Italian name. In addition, when the New England Historic Genealogy Society (or a contractor) prepared the Index of Births in Massachusetts, the given name was shortened to a 3 character name. The record is in Ancestry. And it will never be correct!

In her aunt Florence's case, Regina learned that the individual who tried to locate the record to prepare for the birth certificate did not find it. The Record is in Ancestry. Regina has the information that will guarantee that a birth certificate will be prepared.

Neither records were in FamilySearch.org or in AmericanAncestors.org – they should have been in both.

INTRODUCTION:

I am passionate about genealogy and about helping people find out about their ancestors. I do not charge for my services.

Also, I specialize in on-line genealogy. In addition, I write articles on genealogy research.

Personally, I want the client to learn as much as possible in the hours that I help the client with the ancestor search. My free consultations are usually one-on-one at three sites: my local library, Morrill Memorial Library in Norwood Massachusetts; the library at the Irish Cultural Centre of New England (ICCNE) in Canton Massachusetts; and the library at the Friends of Irish Research (FIR) in Brockton Massachusetts.

This year, I'll also consult at the Irish Fest which is held at the ICCNE on June 4 and 5, 2016.

This article identifies my latest approach to conducting individual consultations to get more accomplished from their limited time with me.

FIRST, PREPARE A PEDIGREE CHART - REQUIRED IF THE FIRST INDIVIDUAL TO BE SEARCHED FOR IS ON YOUR DIRECT LINE (PARENTS, GRANDPARENTS AND GREAT GRANDPARENTS)

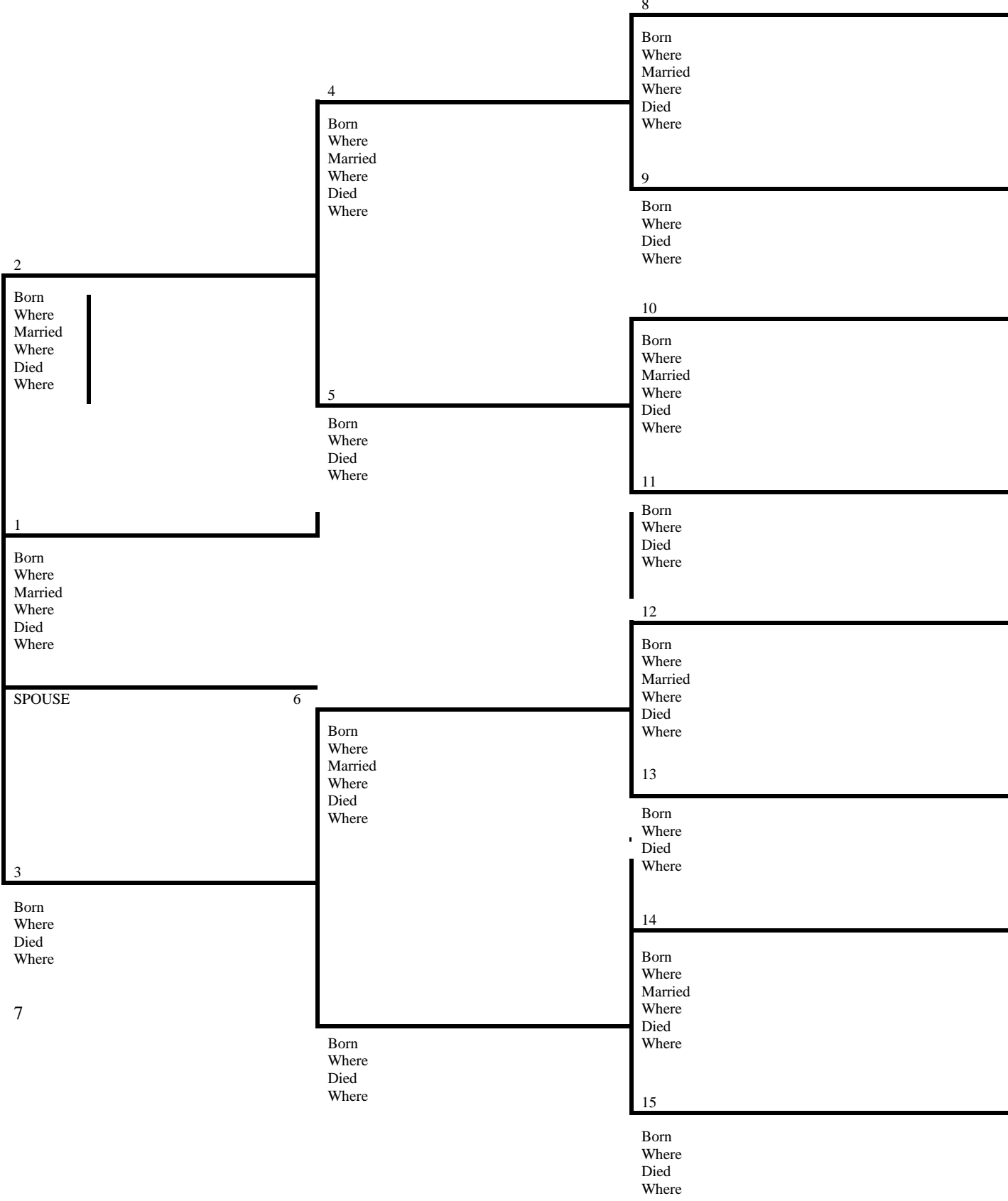
The next page has a blank Pedigree Chart. Use it to identify your parents, grandparents and great grandparents – your direct line. Start with yourself in Block 1. In Block 2, fill in your father's information followed by your mother's information in Block 3. In Blocks 4 and 5, fill in your father's parents' information where the male's information was always in the even numbered block. Then fill in Blocks 6 and 7 with your mother's parents' information. Blocks 8 through 15 are reserved for your Great Grandparents.

If you use genealogy software, use Reports or other options to print a Pedigree Chart. Mark up the print-out to show where the individual to be researched may have lived. Identify multiple marriages.

Fill in what you can. Don't be embarrassed about missing information.

PEDIGREE CHART

CHART NO. _____



IF A PEDIGREE CHART IS NOT REQUIRED, PREPARE A “TO-DO’ LIST USING COMPUTER HARDWARE:

If you do not have a computer, skip this. Go to the next section.

If you do not use genealogy software, and if you use a PC, Laptop, Notebook, Tablet etc., simply list the individual(s) that you’d like to start with. I’d recommend no more than two or three.

Below each name, list what vitals you know: Given Name Surname; Maiden Surname (for females); Date and Place of Birth; Date and Place of Christening; Date and Place of Marriage; Date and Place of Death and Date and Place of Burial. If you do not know a date, type in a date range. Also, list where the individual may have lived.

If you know it, enter a place name like Ireland, Canada. Nova Scotia, Maine. Massachusetts etc. A Community Name like Norwood, Dedham, Glace Bay, North Sydney would help.

Repeat the process for each Spouse.

Review the document and assign priorities. Use cut and paste to revise the document get the list of individuals in order with the highest priority first.

Print the document with one individual per page.

Bring a pencil. It is likely that you’ll need to mark-up the pages. You’ll likely want to copy URLs that the genealogist will use in the Search.

PREPARE A “TO-DO’ LIST USING PENCIL, LINED PAPER, 5 X 8 LINED PAPER, INDEX CARDS ETC.

Using a pencil is most important! It is likely that you’ll need to erase entries.

List each individual on a new piece of paper, index card, etc.

Below each name, list what vitals you know: Given Name; Surname; Maiden Surname (for females); Date and Place of Birth; Date and Place of Christening; Date and Place of Marriage; Date and Place of Death and Date and Place of Burial. If you do not know a date, type in a date range. Also, list where the individual may have lived.

If you know it a specific locale, enter a place name like Ireland, Canada. Nova Scotia, Maine. Massachusetts etc. A Community Name like Norwood, Dedham, Glace Bay, North Sydney would help.

Repeat the process for each Spouse.

Review the document and assign priorities. Sort the pages to list of individuals in order with the highest priority first.

Bring the pages to the consultation.

Bring a pencil. It is likely that you’ll need to mark-up the pages. You’ll likely want to copy URLs that the genealogist will use in the Search.

FINALLY, PREPARE MENTALLY:

Know your goals. As a minimum, hope that the genealogist can help: by filling in missing information; by showing you web sites that you can use; and by adding one or many generations. A memorable experience for a college classmate was when he learned the townland in Ireland that his mother was from. Added memories were when he visited the townland. He confessed later that he knew why his mother, grandmother and uncle immigrated to the United States.

Prepare yourself for not finding anything. It is rare but it happens. In fact, it happened one Friday night at the ICCNE (15 April 2016). The client is trying to get a required birth record for an Irish citizenship registration. The starting given name was Patrick. I invited the client back so I could repeat the search using Padraig and other names starting with a P as the given name. (On April 15th, I only used Patrick.)

Prepare yourself for not finding anything new. If you have researched an individual and want the genealogist to validate and reaffirm your research, tell the researcher what you know. One time when I found information, the client kept showing me documents that she had prepared - but had not told me about. The client appeared to be asking me to confirm her research. Then the client got upset because we had not found anything new. The client did not understand that by keeping secrets our time was misused.

Prepare yourself for learning information that you'd rather not know. One elderly gentleman had difficulty dealing with the fact that his father never spoke of his aunt. He seemed to believe that the two census records were incorrect. He did not believe it when I found his aunt buried as a youngster in the family plot. His grandson who drove him to the session asked for copies of the 2 Census pages and the Find a Grave page. I think his grandson believed. Another example: My wife's aunt had told us that she had other siblings. Yet she never divulged any other details. We found the 3 others when we went to the New Calvary Cemetery in Boston with a copy of the deed and asked for a list. Two of those other siblings were infants who died within hours of birth. The third was a youngster who died in a Flu Epidemic.

Prepare yourself for a researcher finding skeletons hidden in a closet. My father's sister was aghast when I told her about her grandmother who was married 3 times and had 8 children. Her grandmother was twice widowed and very young with 6 children when she married the third time. (She was pregnant when her first two husbands died.) Her third husband outlived her. I wonder if my aunt had been told that her grandmother was an "immoral wanton" woman. My aunt became a reformed skeleton keeper.

Prepare to avoid bringing too much documentation. A client filled up an 8 foot long table with documentation. When I told the client that I wanted to work on one individual at a time, the client needed extra time to select an individual. The client was upset when we did not find any new information. Looking into her books took up too much time.

HOW IS THE NEW APPROACH DIFFERENT?

Previously, I asked the client to identify the individual to be researched. I asked whether the individual was on the direct line. If yes, I helped the client prepare the Pedigree Chart. It is time-consuming.

The new approach virtually eliminates those steps. For the well-prepared, more time can be spent on research.

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Your corrections, comments and suggestions are appreciated. Please Email me at:
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