

# SAYRE & SAYRE

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## Genealogical Research Contract

### Client Responsibilities

I, \_\_\_\_\_, known in this contract as *Client*, agree to the following:

1. I will provide Genealogist with specifics of the research to be done, or a summary of the problem with which I need help, as follows (attach computer printout if preferred):

2. I will provide to Genealogist any reports, summaries of previous research, copies of records, notes on sources previously searched, and any other information that has a bearing on the research I have contracted Genealogist to perform for me. These may include, but are not limited to, family group sheets, ancestral charts, places lived, religion, and other information on my ancestors and their siblings. I understand that research on these collateral lines can result in information about my direct ancestors that may appear in no other records.

3. I will inform Genealogist of any sensitive or private information. I hereby grant permission to Genealogist to use materials and/or reports (respecting 72 years for privacy restrictions) done on my behalf, as warranted, for submission to the Board for Certification of Genealogists with her certification renewal application and/or as samples for lectures and/or articles which she develops.

4. I have enclosed an initial minimum deposit fee of \$200, made payable to Pamela K. Sayre or Richard G. Sayre, representing up to four hours' work or a combination of hourly work and reimbursable expenses amounting to

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\$200. I understand that Genealogist's research services must include an initial analysis of my research problem, and a written research plan. This deposit fee will be applied to authorized time spent on my behalf performing these tasks, with any time left to be spent on research.

5. I hereby set a limit on time and expenses for this phase of research in the amount of \$\_\_\_\_\_. I will pay Genealogist the fee of \$50.00 per hour for services including, but not limited to, analysis, research, travel, consultation, client communication, and report preparation. I will also reimburse Genealogist for the actual cost of items including, but not limited to, photocopies, microfilm copies, postage, parking fees at research facilities, telephone calls, and miscellaneous expenses. When this phase of research is completed, no further research will be performed until Genealogist receives my payment, and until I provide written authorization for the next phase of research.
6. I understand that Genealogist currently does not charge mileage or travel expenses to research facilities she/he regularly visits in the Salt Lake City, Utah, area. If, with my prior permission, Genealogist travels out of her/his usual area to perform research for me, I agree to reimburse her travel expenses at the current IRS allowable rate per mile. If an overnight stay is required, I further agree to reimburse her lodging in an amount not to exceed \$100.00 per night. I understand that if Genealogist travels to out-of-area research facilities when she has research to perform for several clients, my share of these travel expenses will be pro-rated based on the number of Clients' work being performed by Genealogist on the trip. If I require research at these facilities immediately, I, alone, will pay the full cost of mileage and hotel for Genealogist.
7. I understand that Genealogist will provide an itemized statement showing time and expenditures, along with the research report, when authorized research is completed, and that my payment is required within 15 days of the statement date.
8. If any dispute arises out of this agreement, I agree to abide by confidential arbitration services of the Board for Certification of Genealogists or the Association of Professional Genealogists.

Signature of Client: \_\_\_\_\_ Date: \_\_\_\_\_

## Genealogist Responsibilities

I, Pamela Boyer Sayre, CG, CGL, FUGA, or Richard G. Sayre, CG, CGL, FUGA, known in this contract as *Genealogist*, agree to the following:

1. I will perform research or other services requested by the Client as an independent contractor, adhering to professional standards in genealogy, including the Code of Ethics and Conduct of the Board for Certification of Genealogists, the Code of Ethics of the Association of Professional Genealogists, and the Standards recommended by the National Genealogical Society. Copies of these will be furnished to client upon request.
2. My hourly rate of \$50.00 is charged for services including, but not limited to, analysis, research, travel, client communication, and report preparation.
3. My reimbursable expenses include, but are not limited to, the actual cost of photocopies, microfilm copies, postage, parking fees at research facilities, telephone calls, and miscellaneous expenses.
4. No travel expenses are charged for research facilities that I visit regularly in the Salt Lake City, Utah, area, including the Family History Library.
5. I travel to out-of-area facilities, such as facilities in Washington, D.C., when I have several clients' work to perform. By combining clients' research in a single trip, travel expenses can be pro-rated based on the number of clients for whom research is being performed. Clients save money by sharing the expenses. When research is required at these out-of-area facilities, Genealogist will notify Client and request prior approval before travel commences.  
Reimbursable travel expenses include mileage at the current IRS allowable rate and lodging not to exceed \$150

per night if an overnight stay is required within the Washington, D.C., area. I do not charge for reimbursement of meals while on travel for the Client.

6. I will begin work as soon as practicable upon receipt of client's signed contract and minimum deposit fee of \$200. If I am unable to begin Client's work immediately due to other client work or responsibilities, I will not cash Client's check until ready to commence actual work for Client.
7. I will perform no additional research beyond that authorized by Client in this Contract, until Client authorizes it, and we both agree, in writing.
8. I will hold confidential any information on living persons or sensitive matters, as defined by Client.
9. After analysis and research, I will report all facts discovered and cite the sources consulted, whether or not they contain relevant information, in the form of a laser-printed fully documented report. This report will describe my findings, conclusions, and suggestions for further research, and will include copies of relevant documents, if available.
10. Upon completion of a research phase, I will send Client an itemized statement showing time and expenditures, along with the research report.
11. If any dispute arises out of this agreement, I agree to abide by confidential arbitration services of the Board for Certification of Genealogists or the Association of Professional Genealogists.

Signature of Genealogist: \_\_\_\_\_ Date: \_\_\_\_\_