

**Letter of Agreement and Contract for  
Genealogical Research Services**

**J. Wendell**  
genealogical research co.

This agreement is made on the \_\_\_\_\_ day of \_\_\_\_\_ 2017, by and between Karen MacArthur Grizzard and/or Ericka L. Grizzard doing business as J. Wendell Genealogical Research Company, herein referred to as "JWR" and \_\_\_\_\_, herein referred to as the "Client." This agreement is intended to be a contract between the Client and JWR for professional genealogical research.

JWR will perform this work as an independent contractor in accordance with prevailing professional standards in genealogy, and in doing so will follow the Code of Ethics and Professional Practices established by the Association of Professional Genealogists, a copy of which can be found on the JWR website: [www.jwendellresearch.com](http://www.jwendellresearch.com)

The Client understands that this research will require a consultation and review of the Client's existing information and documentation, as well as the formation of a research plan after an evaluation of the Client's materials. The Client's information and materials will be reviewed for accuracy and then JWR will evaluate the Client's objectives based on either an hourly plan or a research package offered by JWR. All reports provided by JWR will be sourced and documented, and copies and/or original documents will be provided to the Client in digital and/or paper form. The Client understand that JWR may not be able to overcome all genealogical problem(s), but that JWR will use all available resources and efforts to locate the Client's ancestor and obtain appropriate documentation. JWR also provides no guarantee that any or all ancestors or documents will be located as a result of agreed upon research. A brief description of the services and/or project that JWR will perform for the Client is as follows:

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All information and documents provided by the Client that is not public record will be kept confidential; this information will not be shared with a third party. In addition JWR will keep confidential the Client's name, address, phone or any other identifying information.

The Client may share, publish (journal, magazine, newspaper, pamphlet) or distribute on the Internet any information in the reports and documents discovered and produced by JWR. The Client resumes all responsibility for accurate transmission of information provided by JWR, public records being the exception. The Client will credit JWR as the source and JWR retains the copyright to the reports or project.

Genealogical services will be performed at a rate of \$25 per hour unless a JWR research package has been selected. Payment for all services up to and including ten hours of research must be paid upon signature of this agreement. For services over ten hours or JWR research packages, a deposit of 50% is required upon signature of this agreement with the final payment being due within seven days of completion of the project. The Client will also assume the additional expenses for any purchased documents, records, certificates,

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admission fees to records repositories and facilities, and research fees paid to researchers in other cities. These additional expenses will not be incurred by JWR without the consent of the Client, and are to be billed separately and at cost. If field travel is required to complete the project, the Client will assume expenses for lodging (up to and not exceeding \$100 per night) and the mileage incurred beyond a 60 mile radius of the Nashville, Tennessee Metropolitan area at the current rate authorized by the Internal Revenue Service (IRS). JWR will not incur field travel expenses without the consent of the Client, and these services will be billed separately and as described above. JWR will send any detailed invoice through PayPal, and accepts PayPal, personal check, or money order as payment (with check or money order being paid to the order of the researcher's name).

The Client authorizes JWR to perform \_\_\_\_\_ hours of genealogical research or to provide the \_\_\_\_\_ research package. Once JWR has reached the hourly objective or the designated hourly midpoint of the research package, the Client will be contacted to go over the project and to receive authorization for any further research should any be needed. This continued research will be billed in the same way as described above.

JWR shall provide the Client with the final product on or before \_\_\_\_\_ weeks. Should JWR need an extension, the Client will be notified and an additional thirty days will automatically be granted.

The Client understands that the final research product will not be released to the Client until the final payment has been received in full. JWR will release the final research product within three business days after the final payment has been received. The Client also understands that if the final payment has not been received by JWR within seven days of project completion or an additional time agreement has not been made between the Client and JWR, that JWR will make one additional seven-day notice, and then reserves the right to turn outstanding debt over to a collections agency or take legal action for services rendered.

The Client will sign and return the letter of agreement by scanned digital copy or through the postal service along with either the full amount or a 50% deposit as described above. Upon receiving all items listed above and existing information from the Client, JWR will begin research as outlined above.

\_\_\_\_\_  
JWR Genealogist

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client's Signature

\_\_\_\_\_  
Date

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**Client Contact Information**

First & Last Name	
Preferred Email	
PayPal Email (if different)	
Preferred Phone	
Address	

**J. Wendell Research Company Contact Information**

**Karen MacArthur Grizzard**  
[karen@jwendellresearch.com](mailto:karen@jwendellresearch.com)

**Ericka L. Grizzard**  
[ericka@jwendellresearch.com](mailto:ericka@jwendellresearch.com)

If making payment by check or money order, please make payment to the order of the researcher's name. If payment or this agreement are mailed through the postal service, please send to the following address: