



YourFamilyLore.co
(916) 306-8330
daniel@yourfamilylore.co

Client Intake and Agreement

Before submitting, please make sure all boxes on the last page are checked, and that you have provided your signature. If you are attaching or sending other records/family trees, you do not need to repeat the same information below.

Client Information

Full Name:

Preferred Name:

Email:

Phone Number:

Time Zone:

Preferred Method of Contact:

Email ☐ Phone ☐ Text ☐

Briefly describe what you are hoping to learn or accomplish:

Client Family Information

Having as much information about your family tree can be very helpful for researching your ancestral lines. If you are comfortable with providing this information, please fill out the section below. All information provided will be kept confidential unless otherwise requested.

Father's Full Name:

Other Known Facts About Father (birth, death, etc.):

Mother's Full Name:

Other Known Facts About Mother (birth, death, etc.):

Paternal Grandfather's Full Name:

Other Known Facts About Paternal Grandfather (birth, death, etc.):

Paternal Grandmother's Full Name:

Other Known Facts About Paternal Grandmother (birth, death, etc.):

Maternal Grandfather's Full Name:

Other Known Facts About Maternal Grandfather (birth, death, etc.):

Maternal Grandmother's Full Name:

Other Known Facts About Maternal Grandmother (birth, death, etc.):

Any other known information about your family that is relevant to the research in question?

Any family rumors/lore you would like to share?

Anything else you would like to share that you think would be helpful?

DNA Test Information

Would you like DNA test information to be used in this research?

(If yes, please fill out the information below)

Have you taken a DNA test?

If yes, what testing company(s) did you use?

Would you be comfortable providing access to your DNA test results to assist in research? (Access is temporary and for research purposes only)

Is there anything you would like NOT researched or disclosed?

Person/Ancestor of Interest

(Fill out the information for the person you want researched to the best of your knowledge, even if you are unsure if it is correct. Partial information and estimates can be used as well. If you do not know an answer or it does not apply, you can leave it blank.)

Full Name of Person of Interest:

Also Known As / Nicknames (if any):

Client's Relationship/Possible Relationship to This Person:

Date of Birth:

Place of Birth:

Date of Death:

Place of Death:

Locations Lived In (place and time period, if known):

Target Person/Ancestor's Family Information

(Fill out any information you know about the family of the person/ancestor being researched, even if you are unsure if it is true.)

Father's Full Name:

Other Known Facts About Father (birth, death, etc.):

Mother's Full Name:

Other Known Facts About Mother (birth, death, etc.):

Spouse's Full Name:

Other Known Facts About Spouse (birth, death, etc.):

Children's Names:

Other Known Facts About Children (birth, death, etc.):

Siblings' Names:

Other Known Facts About Siblings (birth, death, etc.):

Military Service (branch, rank, war fought, etc.):

Occupation:

Religion:

Other Known Information:

Are there any documents/screenshots/family records/etc. that you would like to share? If yes, please describe below, then send by email to daniel@yourfamilylore.co

Research Expectations and Acknowledgement

A genealogist's job is to find the truth to the best of their abilities. Sometimes that truth can be uncomfortable, or nearly impossible to find. Family history research can often reveal unexpected or unwanted information that could be sensitive to some people. A genealogist may not always find the answers you seek, and research is paid by time not results (although results are always the goal). Please acknowledge the statements below, and check the boxes to show you understand these risks.

☐ I understand genealogy research may not produce definitive answers.

☐ I understand research is billed by time, not results.

☐ I understand findings may challenge family stories or assumptions.

☐ I understand DNA evidence, if used, may introduce new hypotheses rather than definitive conclusions.

☐ I understand that research plans may evolve as new evidence is discovered.

☐ I understand and agree that the paid research will be conducted only for the individual(s) listed above, and that any additional research beyond this agreed work will require a separate agreement and/or additional payment.

Print Name

Signature
