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 London, Ontario, Canada
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Genealogy Research & DNA Investigation

INTAKE AND REQUEST FOR SERVICES

CLIENT PARTICULARS:

NAME		DATE	
ADDRESS			
CITY		STATE/PROVINCE	ZIP/POSTAL CODE
PHONE 1		EMAIL	
PHONE 2		OTHER EMAIL	

How did you hear about Discovering New Ancestors? _____

Initial research requested (include short-range goals — please be as specific as possible):

Long range goals (research goals, family publication, etc.):

Which Genealogical sites/services have you used?

	PROFILE/KIT NAME	FAMILY TREE	DNA TESTED/UPLOADED	PREFERRED SERVICE
ANCESTRY	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23&ME	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GEDMATCH	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FTDNA	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MY HERITAGE	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FAMILYSEARCH	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

TERMS AND CONDITIONS — AKA THE FINE PRINT

I. OVERVIEW

A. YOU (“THE CLIENT”) HAVE ASKED DISCOVERING NEW ANCESTORS (“DNA”) TO PERFORM PROFESSIONAL GENEALOGICAL RESEARCH FOR YOU. THIS AGREEMENT, (THE INTAKE AND REQUEST FOR SERVICES WITH THE ACCOMPANYING TERMS AND CONDITIONS), DESCRIBE THE AGREEMENT BETWEEN US REGARDING THAT SERVICE. IF YOU AGREE WITH THESE TERMS, PLEASE SIGN THIS, MAKE A COPY FOR YOURSELF, AND RETURN IT WITH YOUR RESEARCH REQUEST TO: INFO@DISCOVERINGNEWANCESTORS.COM

B. DNA WILL UNDERTAKE TO PERFORM RESEARCH FOR YOU TO THE EXTENT YOU HAVE REQUESTED, USING YOUR SHORT TERM AND LONG TERM GOALS AS GUIDES. DISCOVERING NEW ANCESTORS WILL MAKE A GOOD FAITH EFFORT IN ACCORDANCE WITH PREVAILING PROFESSIONAL STANDARDS IN GENEALOGY, INCLUDING THE CODE OF ETHICS OF THE ASSOCIATION OF PROFESSIONAL GENEALOGISTS, AND WILL USE ITS JUDGMENT TO DIRECT THE RESEARCH IN THE MOST PRODUCTIVE MANNER FOR THE ACHIEVEMENT OF YOUR GOALS.

C. BECAUSE WE DO NOT WISH TO DUPLICATE WORK ALREADY PERFORMED, THE CLIENT AGREES TO SUPPLY DNA WITH INFORMATION PREVIOUSLY OBTAINED TO THE EXTENT POSSIBLE. DNA RESERVES THE RIGHT TO DUPLICATE RESEARCH ALREADY ACCOMPLISHED IF IN OUR ESTIMATION THE ATTENDING CONCLUSIONS OR THAT RESEARCH ARE INCOMPLETE OR INCORRECT. THIS AGREEMENT WILL BECOME EFFECTIVE WHEN DNA HAS RECEIVED YOUR MATERIAL, A COPY OF THIS CONTRACT WITH YOUR SIGNATURE ACCEPTING IT, AND YOUR PAYMENT OF AN INITIAL FEE TO ENGAGE SERVICES, WHICH IS NOT REFUNDABLE AFTER THE START OF WORK. DNA WILL CONTACT YOU IF MORE WORK IS NECESSARY TO COMPLETE THE GOALS YOU HAVE ESTABLISHED, AND WILL PROCEED ONLY IF YOU AUTHORIZE ADDITIONAL WORK AND PAYMENT IN WRITING OR VIA EMAIL.

II. INITIAL CONSULTATION

A. IN ORDER TO BETTER ENSURE THE LIKELIHOOD OF A SATISFACTORY OUTCOME FOR OUR CLIENTS, DNA REQUIRES PROSPECTIVE CLIENTS TO INVEST IN A \$60¹ ONE-HOUR INITIAL CONSULTATION, PAYABLE IN ADVANCE BY CREDIT CARD OR PAYPAL. THE PURPOSE OF THE INITIAL CONSULTATION IS TO ALLOW DNA TO EVALUATE THE EXTENT AND QUALITY OF THE CLIENT’S PRIOR RESEARCH, AND THE EXISTANCE AND EXTENT OF GENETIC TESTING AND KNOWN LINKAGES, IN ORDER TO BETTER ARRIVE AT AN ASSESSMENT OF THE PROBABLE SUCCESS OF THE CLIENT’S RESEARCH REQUEST. THE LACK OF PRIOR RESEARCH AND/OR TESTING WILL IN NO WAY DISQUALIFY A CLIENT’S REQUEST, BUT RATHER ALLOWS ALL PARTIES TO MOVE FORWARD WITH A COMMON UNDERSTANDING OF THE MATTER AS IT PRESENTLY STANDS.

B. THE OUTCOME OF THE INITIAL CONSULTATION MAY RESULT IN THE ACCEPTANCE/REJECTION OF THE RESEARCH REQUEST OR THE RECOMMENDATION TO COMMENCE RESEARCH AFTER GENETIC TESTING OF EITHER THE CLIENT OR A THIRD PARTY HAS BEEN

¹ £45 for UK residents via PayPal — credit card services coming soon!

PERFORMED. THE QUALITY AND AVAILABILITY OF RESULTS FROM SAID TESTING MAY AFFECT THE LIKLIHOOD OF THE SUCCESSFUL RESOLUTION OF THE RESEARCH REQUEST, AND *DNA* RESERVES THE RIGHT TO ACCEPT OR DECLINE THE CLIENT'S PROPOSED REQUEST BASED ON THE AVAILABILITY OF THESE RESULTS.

C. THE \$60 INITIAL CONSULTATION FEE IS NON-REFUNDABLE BUT WILL BE APPLIED TOWARDS CONTRACTED SERVICES IF THE CLIENT ELECTS TO ENGAGE *DNA* FOR THE RESEARCH REQUEST FOR WHICH THE INITIAL CONSULTATION WAS PERFORMED. SUBSEQUENT RESEARCH REQUESTS MAY REQUIRE AN ADDITIONAL INITIAL CONSULTATION AT *DNA*'S DISCRETION, AND INITIAL CONSULTATION FEES ARE NOT TRANSFERRABLE AND MAY NOT BE POOLED OR OTHERWISE COMBINED.

D. RESEARCH REQUESTS DEEMED TO HAVE A REASONABLE LIKLIHOOD OF SUCCESS WILL BE QUOTED A PROBABLE TIME FRAME FOR THE RESEARCH, TYPICALLY BILLED IN 10-HOUR INCREMENTS AT \$60/HOUR². A 10-HOUR ALLOTMENT IS TYPICALLY COMPRISED OF 8 HOURS OF ANALYSIS/RESEARCH AND 2 HOURS OF REPORTING AND DOCUMENTATION. AT THE END OF THE RESEARCH PHASE, THE CLIENT WILL BE INFORMALLY UPDATED AS TO THE PROGRESS OF THE RESEARCH AND GIVEN THE OPTION TO PURCHASE ADDITIONAL RESEARCH HOURS, OR TO PROCEED DIRECTLY TO THE REPORTING PHASE. ADDITIONAL RESEARCH HOURS MUST BE PREPAID AND ARE NON-REFUNDABLE.

III. ANALYSIS, RESEARCH AND REPORTING

A. AFTER *DNA* RECEIVES YOUR MATERIALS, HAS PERFORMED AN INITIAL CONSULTATION, AND ACCEPTED THE CLIENT'S RESEARCH REQUEST, WE WILL ANALYZE THE PROBLEM, COMPLETE RESEARCH AND PRESENT TO YOU YOUR DESIRED PRODUCT, USUALLY A REPORT, CONTAINING A LOG OF RESEARCH, DOCUMENTATION OF ALL SOURCES SEARCHED, A SUMMARY OF THE RESEARCH WITH THE BASIS FOR OUR CONCLUSIONS, SUGGESTIONS FOR FURTHER RESEARCH, AND COPIES OF RELEVANT DOCUMENTS. SIMPLE REQUESTS OF COURSE WILL TAKE MUCH LESS TIME AND MAY NOT HAVE ANY FORMAL REPORT EXPLAINING THEM.

B. DELIVERABLES USUALLY INCLUDE UPDATED PEDIGREE CHARTS AND FAMILY GROUP SHEETS TO ILLUSTRATE HOW THE RESEARCH HAS PROGRESSED, BUT THESE CHARTS ARE NOT TO BE CONSTRUED AS EVIDENCE OF THE DATA CONTAINED ON THEM. EVIDENCE, IF IT EXISTS, IS IN THE BODY OF THE REPORT.

C. *DNA* STRIVES TO USE ORIGINAL SOURCES (SUCH AS VITAL RECORDS) IN GATHERING EVIDENCE OF FACTS AND IN SUPPORT OF GENETICS ANALYSIS. HOWEVER, BECAUSE OF FINANCIAL OR TIME CONSTRAINTS, WE MAY OPT TO BEGIN INVESTIGATIONS WITH DERIVATIVE EVIDENCE (SUCH AS COMPILED SOURCES, GENEALOGIES, TOWN HISTORIES, ETC.). THE CLIENT AGREES THAT *DNA* WILL USE ITS BEST JUDGMENT, BASED ON TIME CONSTRAINTS, TO GATHER THE BEST EVIDENCE POSSIBLE FOR THE STATED GOALS WITHIN THE TIME ALLOWED.

² £45/hour for UK residents, via PayPal.

D. *DNA* WILL STRIVE TO PRODUCE THE CLIENT'S REPORT AS QUICKLY AS POSSIBLE. REPORTS ARE USUALLY SUBMITTED VIA PDF FILE. OUR GOAL IS TO RETURN A REPORT TO THE CLIENT WITHIN 90 DAYS. OCCASIONALLY FACTORS MAY LENGTHEN THAT TIME, SOMETIMES 120 DAYS AND LONGER, BUT *DNA* CONTINUALLY ENDEAVOURS TO SHORTEN RESPONSE TIME, WITH THE UNDERSTANDING THAT QUALITY RESEARCH AND ANALYSIS IS A PRODUCT OF CAREFUL AND THOROUGH EXAMINATION OF THE FACTS AT HAND. *DNA* WILL MAKE EVERY ATTEMPT TO CONTACT THE CLIENT WHEN EVENTS TRANSPIRE WHICH MAY INTERFERE WITH THE TIMELINESS OF REPORTING, AND WE APPRECIATE YOUR PATIENCE WITH THE PROCESS. IT IS OUR BELIEF THAT THE PROFESSIONAL QUALITY OF OUR RESEARCH AND REPORTS MORE THAN JUSTIFY THE TIME REQUIRED TO PRODUCE THEM.

IV. CHARGES

A. OUR NOMINAL RATE IS \$60 (SIXTY DOLLARS)³ PER HOUR, PAYABLE VIA PAYPAL (CREDIT CARD OPTIONS COMING SOON!) PRIOR TO COMMENCING RESEARCH. RETAINERS ARE NON-REFUNDABLE ONCE RESEARCH HAS BEGUN; UNUSED HOURS MAY BE APPLIED TOWARDS ADDITIONAL RESEARCH, GENETIC TESTING, DOCUMENTATION, TRAVEL, OTHER REIMBURSIBLE EXPENSES, OR INITIAL CONSULTATION FEES FOR ANOTHER PROJECT.

B. *DNA* MAINTAINS SUBSCRIPTIONS AT MAJOR GENEALOGY SITES AND WILL OBTAIN RECORDS FROM THESE SITES WITHOUT ADDITIONAL CHARGE TO THE CLIENT. HOWEVER, PHOTOCOPIES, ORIGINAL CERTIFICATES AND ITEMS REQUESTED FROM OTHER SOURCES MAY INCUR ADDITIONAL CHARGES, AND *DNA* WILL MAKE EVERY EFFORT TO OBTAIN THE CLIENT'S PERMISSION PRIOR TO OBTAINING THESE RECORDS. TELEPHONE AND POSTAGE CHARGES, BOTH DOMESTIC AND OVERSEAS, WILL BE ITEMIZED AND SUBMITTED TO THE CLIENT.

C. IN THE COURSE OF OUR INVESTIGATIONS *DNA* MAY DETERMINE THAT THE CLIENT'S GOALS ARE BEST SERVED BY OBTAINING ADDITIONAL GENETIC TESTING, EITHER OF THE CLIENT OR OTHER INDIVIDUALS. SUCH TESTING WILL BE PERFORMED ENTIRELY AT THE CLIENT'S DISCRETION AND MUST BE PAID FOR BY OR CONTRACTED BY THE CLIENT. IF THE CLIENT OPTS NOT TO PURCHASE THE RECOMMENDED TESTING OR IF THE TESTING SUBJECT DOES NOT CONSENT OR IS OTHERWISE NOT IMMEDIATELY AVAILABLE, THE CLIENT MAY INSTRUCT *DNA* TO CONTINUE THE RESEARCH INsofar AS POSSIBLE, POSTPONE FURTHER RESEARCH UNTIL SUCH TIME AS TEST RESULTS ARE AVAILABLE, OR PROCEED TO THE REPORTING AND DOCUMENTATION PHASE OF THE RESEARCH REQUEST.

D. MANY RECORDS ARE AVAILABLE ONLINE OR VIA MAIL, BUT IN THE EVENT FIELD RESEARCH IS REQUIRED — EITHER AT REGIONAL ARCHIVES, CEMETERIES, OR THE LIKE — TRAVEL OUTSIDE OF OUR REGIONAL BASE OF LONDON, ONTARIO, SUBJECT TO THE CLIENT'S APPROVAL, WILL BE PRORATED AT 60¢ PER MILE PLUS TRANSPORTATION FARES, IF REQUIRED.

E. ALTERNATIVELY, *DNA* MAY ELECT TO CONTRACT OUTSIDE THIRD-PARTY RESEARCHERS ON THE CLIENT'S BEHALF TO PERFORM FIELD WORK. IN MOST CASES, THE RATES OF THIRD-PARTY RESEARCHERS WILL BE HARMONIZED WITH *DNA*'S HOURLY BILLABLE

³ As before, £45/hour for UK residents, via PayPal.

RATE; IN EXCEPTIONAL CIRCUMSTANCES THIRD-PARTY RESEARCH MAY BE BILLED THROUGH AT A HIGHER RATE, HOWEVER IN ALL CASES *DNA* WILL OBTAIN THE CLIENT'S PERMISSION PRIOR TO ENGAGING OUTSIDE RESEARCHERS AND WILL ITEMIZE SUCH CHARGES AND CONTRACTORS REIMBURSIBLE EXPENSES. *DNA* WILL MAKE EVERY EFFORT TO CAP CONTRACTOR CHARGES PRIOR TO ENGAGING THEIR SERVICES.

F. AT MINIMUM, HALF THE CONTRACTED AMOUNT, OR \$500.00,⁴ WHICHEVER IS LESS, SHOULD BE REMITTED PRIOR TO COMMENCING RESEARCH. THE CUSTOMER WILL BE BILLED FOR THE REMAINING AMOUNT BEFORE THE FINAL REPORT, WHICH MAY INCLUDE REIMBURSIBLE COSTS AS OUTLINED ABOVE. FULL PAYMENT IS DUE PRIOR TO RECEIPT OF THE REPORT. THESE CHARGES ARE SUBJECT TO CHANGE WITHOUT NOTICE, BUT *DNA* WILL STRIVE TO CONTACT THE CLIENT BEFORE ANY CHANGES GO INTO EFFECT.

IV. RESEARCH

A. WHEN THE CLIENT CONTRACTS *DNA* TO PERFORM RESEARCH, THE CLIENT BECOMES THE OWNER OF THAT RESEARCH. HOWEVER, *DNA* RETAINS COPYRIGHT TO THE REPORT. *DNA* RESERVES THE RIGHT TO PUBLISH PORTIONS OF THE REPORT, GIVING THE CLIENT CREDIT FOR UNDERWRITING THE RESEARCH. INFORMATION SUPPLIED BY THE CLIENT TO *DNA* THAT IS NOT A MATTER OF PUBLIC RECORD WILL BE HELD IN CONFIDENCE.

B. *DNA* RETAINS COPYRIGHT TO ITS REPORT AND THE MANNER IN WHICH INFORMATION IS EXPRESSED IN IT. THE CLIENT MAY MAKE A LIMITED NUMBER OF PERSONAL COPIES AS A "FAIR USE" OF THE COPYRIGHTED REPORT, BUT THE CLIENT AGREES TO NOT OTHERWISE PUBLISH OR MAKE MULTIPLE COPIES OF THE REPORT WITHOUT *DNA*'S WRITTEN PERMISSION. THE CLIENT AGREES THAT IF *DNA*'S RESEARCH IS CITED OR INCLUDED IN WHOLE OR IN PART IN OTHER REPORTS, THE CLIENT WILL REPORT IT ACCURATELY AND CREDIT *DNA* AS THE SOURCE.

C. THE CLIENT MAY ELECT TO PLACE A COPY OF *DNA*'S CONTRACTED RESEARCH IN ANY REPOSITORY OF THEIR CHOOSING. *DNA* KINDLY REQUESTS NOTIFICATION WHEN A REPOSITORY OR INSTITUTION ACCEPTS OUR RESEARCH.

SIGNED AND DATED BY THE CLIENT

DATE

PLEASE SIGN THIS DOCUMENT AND RETURN IT TO: [INFO@DISCOVERINGNEWANCESTORS.COM](mailto:info@discoveringnewancestors.com)

YOU SHOULD RETAIN A COPY FOR YOUR RECORDS.

⁴ £300 for UK residents, via PayPal.