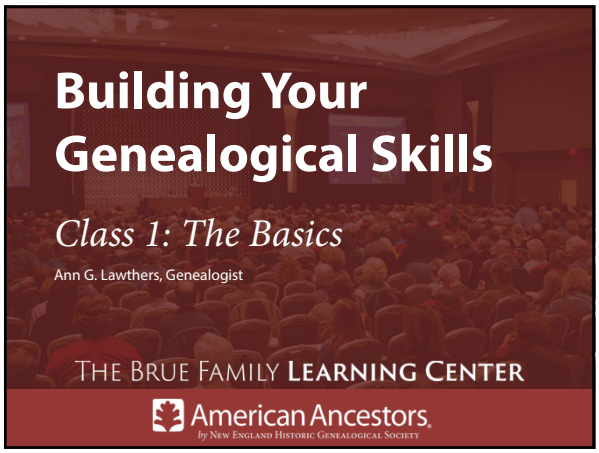

1

Course Overview

Session 1

The Basics:
Steps, forms, genealogical conventions, sources of genealogical information

Session 2

Researching:
Research strategies and organizing what you find

Session 3

Analyzing and Beyond:
Evaluating the evidence and developing genealogical proof

2

Session Roadmap

- What is Genealogy?
- Steps for Researching
- Focus on step three: sources
- Homework

3

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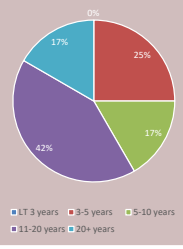
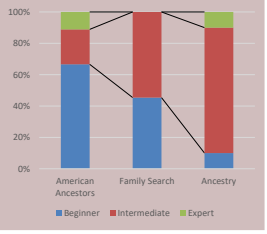
4

Pre-Course Survey Results

How long have you been researching your family history?



How do you rate your level of experience with genealogical websites?



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Pre-Course Survey Goals

- How to become a better, and more efficient, researcher
- How to organize and keep track of research
- How to make the most of online sources
- Learn how to cite/document sources
- How to breakdown barriers and brick walls
- How to get the most out of in-person visits to archives
- How to find out about actual individuals

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Session Roadmap

- What is Genealogy?
- Steps for Researching
- Focus on step three: sources
- Homework

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What is Genealogy?

ge·ne·al·o·gy (jēnēˈäləjē)

- Study of our ancestors - our parents, their parents, siblings and so on
- More than names and dates - stories and how our families fit into history
- Stems from ancient Greek
  - *Genea* meaning generation
  - *Logia* meaning telling or discourse or study of

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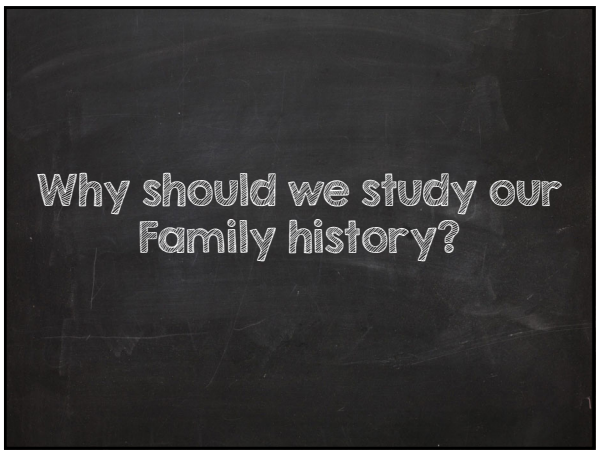

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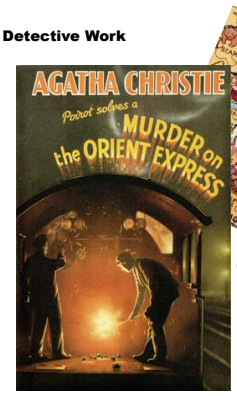
Detective Work



OR

Jigsaw Puzzle

10

Connect to History

- Window into the past – learn about new people and new places
- Connect your family story to notable events in history

11

Session Roadmap

- What is Genealogy?
- Steps for Researching
- Focus on step three: sources
- Homework

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Genealogical Research Method

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Steps for Researching Your Family

- Step 1 • Identify what you know
- Step 2 • Decide what you want to learn (Research goal)
- Step 3 • Identify and locate your sources
- Step 4 • Research!
- Step 5 • Analyze

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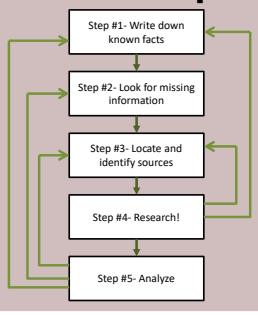
Rinse and Repeat



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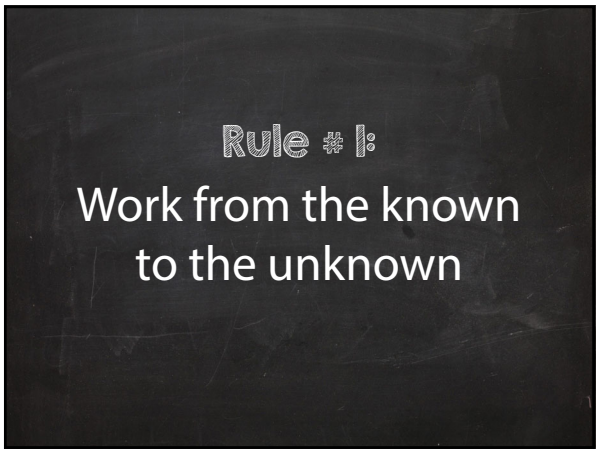

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Step 1: Identify What You Know

- Interview yourself
- Talk to relatives—What do they know? What family stories were they told?
- Record data using a family group sheet, chart, or genealogical software

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Example: Family Interview Questions

- Where did you live when you were growing up?
- How did your family come to live there?
- Were there other family members in the area? What were their name?
- What was your family religion?
- What family stories have you heard about your parents? Your grandparents? More distant relatives?
- What stories have you heard about the European (or other) origins of your family members and their immigration to America?

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Rule # 2:

Write It Down

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The Essential Toolkit

- Notebook – paper or Evernote or One Note
- Pedigree chart
- Family Group Sheet
- Research Plan
- Research Log
- Genealogical software program (optional)

Tip

Always Use Pencil!!

20

THE BRUE FAMILY **LEARNING CENTER** *Find out more*

Download Templates and Charts

Free Resources from NEHGS

Education

Learning Resources

Watch

Read

Download

Online Programs

Research Tours & Programs

Events and Programs

Register for a FREE Guest account to access forms, templates and other tools to help organize and present your family history research. More about Guest benefits.

Already have an account? Log in for access to more resources or join to enjoy full member benefits, including:

- Access to all 1+ billion records on AmericanAncestors.org
- Quarterly delivery of the member magazine, *American Ancestors*
- Delivery of NEHGS's scholarly journal, *The Register*
- Discounts on research-for-hire, consultations and publications
- Free admission to NEHGS's library including special collections and manuscripts
- Member-only online courses
- NEHGS's weekly e-newsletter *The Weekly Genealogist*

https://www.americanancestors.org/education/learning-

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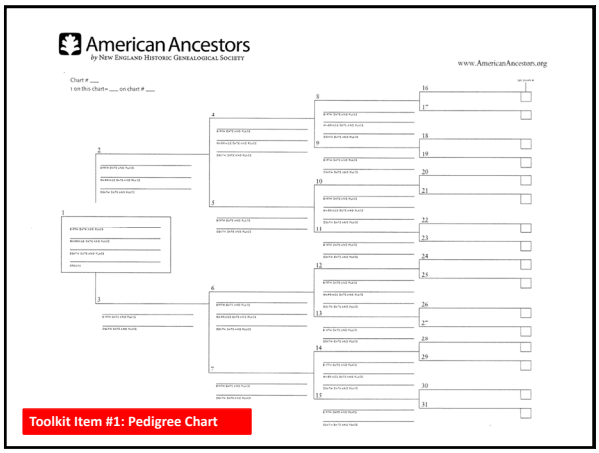

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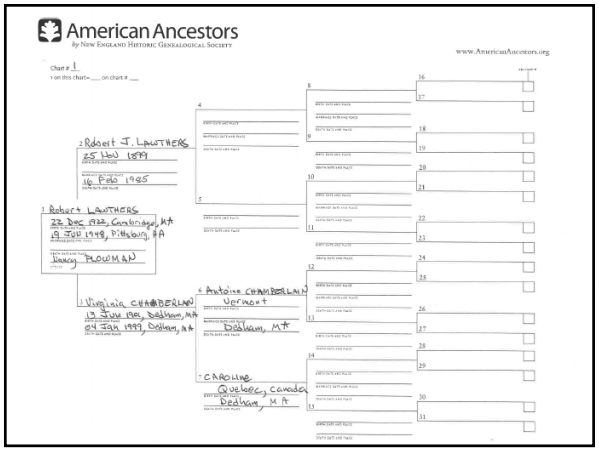

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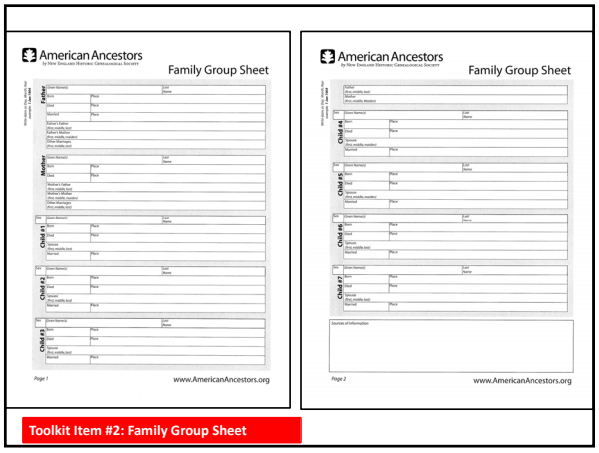

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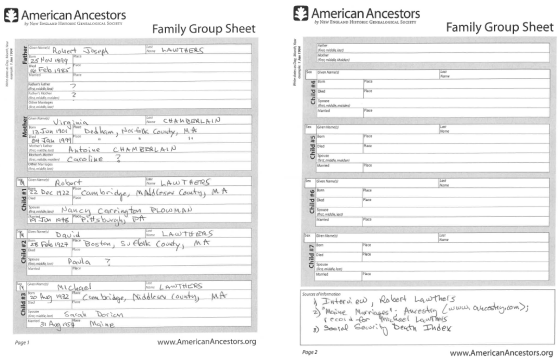

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Record the Information As You Go

- Keep a "working draft"
- Use the forms
  - Tree/pedigree chart
    - Pen/paper
    - Online (AncesTREES, Ancestry.com, FamilySearch.org)
    - Software (FamilyTreeMaker, RootsMagic, Legacy Family Tree)
  - Family group sheet
  - Interview form/family questionnaire
  - Save original images/Documents

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Genealogical Recording Conventions: Names

- Write surnames in all CAPITAL LETTERS
- Record a woman with her maiden name
- When the maiden name is unknown use:
  - [--?--] can be used
  - MNU
  - Just the given name

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Genealogical Recording Conventions: Dates

- Records dates as DD-MMM-YYYY (e.g. 23 MAR 1823)
- DON'T:
  - Use slash marks: 3/12/1823
  - Use a two-digit year: 3/12/23

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Genealogical Recording Conventions: Places

- Note smallest to largest geographic division (e.g. Orleans, Orange County, Indiana)
- For outside the U.S.: townland/parish, county, country
- Be sure to identify counties
- Use a consistent style

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Step 2: Decide What You Want to Learn

- Examine the information you have
- What is missing?
- What individuals or families intrigue you the most?
- Create a list of questions or objectives to research

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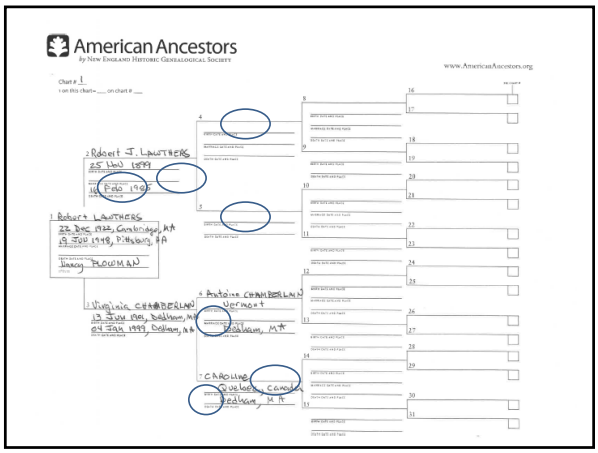

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Typical Genealogical Questions

- Genealogical Data
  - Identity
  - Events
  - Relationships
- For example:
  - Who are the parents?
  - What is the date or place of birth, marriage or death?
  - What is the spouse's name, or maiden name?
  - Who are the siblings?
  - Where did the family come from

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Tip

Start slowly. Don't rush to answer all your questions at once.

Don't skip generations in planning your research; it only leads to misattributed people.

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Toolkit Item #3: Research Plan

- Research Plan: A roadmap for research
- Basic Components:
  - Good research question
  - What is already known about the question
  - List of potential records
  - List of repositories

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Tip

Anchor your research to a *Xmqi*, a *Tpægi* and a *Reqi*

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Step 3: Identify and Locate Your Sources

- Educate yourself – what types of records will supply the information you need?
- Make a list of records that will aid in your specific research
- Find resources in brick-and-mortar repositories and online repositories
- Map out your plan of action
- Don't forget the "Family Archives!"

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Standard Genealogy Records

- Census
- Vital Records
- Church and Cemetery Records
- Military Records
- Land
- Probate
- Passenger and Immigration Records
- Newspapers
- Counties Histories

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Records

Information Needed	Search These Records First	Then Search These Records
Age	Census, Vital Records, Church Records, Cemeteries	Military Records, Taxation, Bible Records, Town Records, Emigration and Immigration
Birth date and place	Vital Records, Church Records, Census (for place), Town Records	Cemeteries, Bible Records, Newspapers
Marriage date and place	Vital Records, Church Records, Census, Newspapers, Bible Records	Military Records, Probate Records, Naturalization
Death date and place	Vital Records, Church Records, Cemeteries, Probate Records	Newspapers, Bible Records, Military Records, City Directories
Parents' names	Vital Records, Census, Probate Records, Newspapers, Published Genealogies, Local Histories	Emigration and Immigration, Bible Records
Maiden name	Vital Records, Church Records, Newspapers, Bible Records	Cemeteries, Military Records, Probate Records, Town Records

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More Records

Information Needed	Search These Records First	Then Search These Records
Immigration date	Census (year only), Immigration, Naturalization	Newspapers, Biographies
Country of foreign birth	Naturalization Records, Census, Church Records, Vital Records, Emigration and Immigration	Cemeteries, Military Records, Newspapers, Local Histories
Foreign birth location	Vital Records, Emigration and Immigration, Census, Published Genealogies, Local Histories, Naturalization	Newspapers, Church Records, Military Records
Places family has lived	Census, Land, Local Histories, City Directories, Vital Records	Newspapers, Taxation, Military Records, Probate Records

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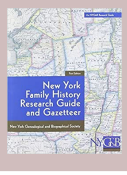
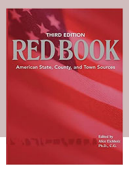
Use Finding Aids/ Research Guides

- Determine when record-keeping began
- Determine what repositories hold records
- Understand unique record types





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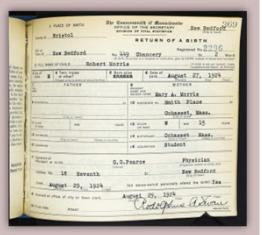
Step 4: Research!

- Begin answering your questions
- General principles
  - Consult multiple sources
  - Gather as many records about a family or individual that you can find
  - Track your work!



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Toolkit Item #4: Research Logs

- Keep track of what you have researched
- Categories of research logs
  - Person
  - Place
  - Family
  - Event
  - Repository
  - General
- What to include on a research log
  - Date of search
  - Source searched
  - Search objective
  - Search string
  - Results of search

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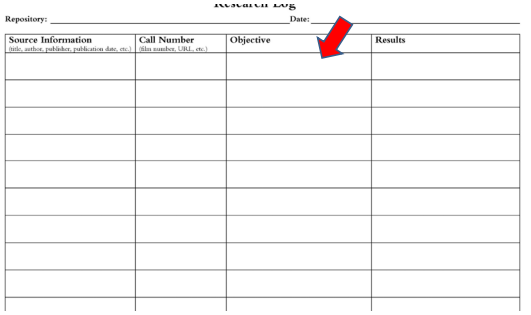
Research Log


Research Log

Repository: _____ Date: _____

Source Information (title, author, publisher, publication date, etc.)	Call Number (film number, URL, etc.)	Objective	Results

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Excel Spreadsheet

Source	Repository	Objective	Time Period	Location	Type of Record	Finding	Notes	Citation
Vital Records								
Census Records								
1880 U.S. Federal Census	FHL	Crotty Family	1880	Eastchester		James, Elizabeth, Marcella, John, James, Jane, Thomas		"1880 U.S. Federal Census," Eastchester, Westchester, New York, population schedule, ED 95, page 25, family 233, household of James Crotty; online images viewed at *Ancestry* (ancestry.com : viewed 4 Feb 2008), citing NARA microfilm T9, roll 945
1850 U.S. Federal Census	FHL	James Crotty	1850	New York		James, Eliza, Ellen	Ellen is 6 mos old, so she was born Feb 1850	"1850 U.S. Federal Census," New York (Ward 17), New York, Population Schedule, Page 274b, household of James Crotley; online image viewed at *Ancestry* (ancestry.com : viewed 4 Feb 2008) citing NARA microfilm M432, Reel 556
1860 U.S. Federal Census	FHL	James Crotty	1860	Eastchester		James Eliza, Ellen, John, James, Jane, Mary, Ellen	Ellen the older is 76 years old, born in Ireland	"1860 U.S. Federal Census," Eastchester, Westchester, New York, Population Schedule, Page 89, household of Jas Crotty; online image viewed at *Ancestry* (ancestry.com : viewed 4 Feb 2008) citing NARA microfilm M653
1870 U.S. Federal Census	FHL	James Crotty	1870	Eastchester		James, Eliza, Marcila, John, James, Jane, Thomas	Mary appears to have died	"1860 U.S. Federal Census," Eastchester, Westchester, New York, Population Schedule, Page 274b, household of James Crotty; online image viewed at *Ancestry* (ancestry.com : viewed 4 Feb 2008) citing NARA microfilm M593, roll 1114
Cemetery Records								
Website/Wills								
Newspapers								
Published Genealogies								
City Directories								

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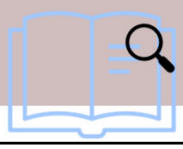
Step 5: Analyze

- Don't just read, examine
  - Does the record bring up new questions?
  - How accurate is the record?
  - How accurate is the source?
- Record the information you have
- Record the sources you use



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Principles of Analysis

- Are you looking at a original or derivative source?
- When was the record created, i.e. how soon after the event it is capturing?
- Who created the record? A participant? Someone else?
- Who provided the information?
- Which information is primary (firsthand knowledge) and which is secondary (secondhand knowledge)
- What information do I need to capture for a citation?

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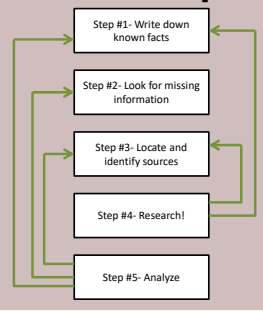
Rinse and Repeat



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Genealogical Proof Standard

- Reasonably exhaustive research
- Complete, accurate citations to the source or sources of each information item
- Tests—through processes of analysis and correlation—of all sources, information items, and evidence
- Resolution of conflicts among evidence items
- A soundly reasoned, coherently written conclusion.

http://www.bcgcertification.org/resources/standard.html

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Why Bother With A Proof Standard?

- Guides your evaluation of evidence
- Provides a framework for putting together a credible argument for a genealogical fact, e.g. who are the parents of Jacob Homer?
- Helps you feel secure with your conclusions, especially when your only evidence is indirect.

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Let's Review

1. Rule #1 – Start with what you know and work backwards
2. Rule #2 – Write it down
3. Use the tools: Pedigree Chart, Family Group Sheet, Research Log
4. Be systematic
   a) Identify what you know
   b) Decide what you want to learn
   c) Identify sources
   d) Research
   e) Analyze

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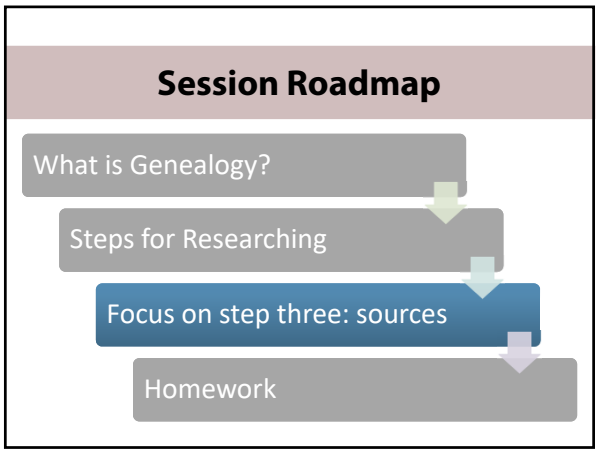

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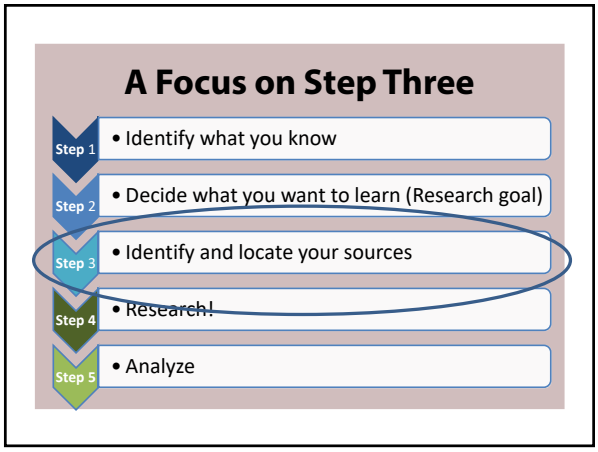

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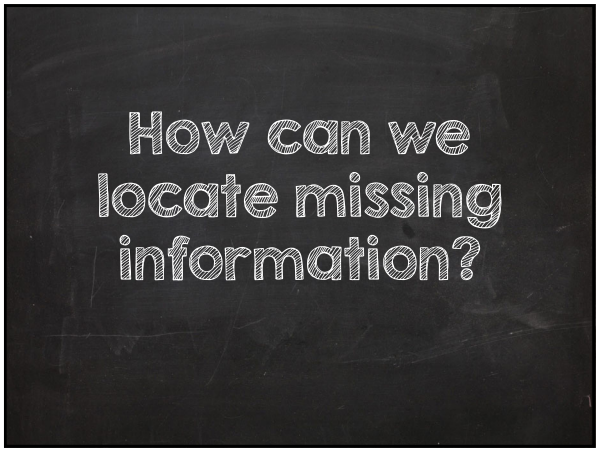

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Tip

Educate Yourself About Records and Sources

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Definitions: Sources and Records

- A **source** is a coherent collection of **records** created by a single jurisdiction or a single author for a defined purpose.
- A **record** is that portion of a **source** which pertains to a single event.

Robert Charles Anderson, *Elements of Genealogical Analysis* (Boston: NEHGS, 2014) p. 1

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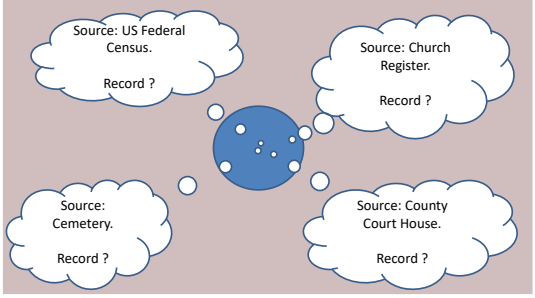
Sources and Records



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Key Records for Genealogical Research

- Vital Records
- Vital Record substitutes
  - Church records
  - Cemetery records
  - Newspapers
  - Probate
- Census
- Immigration and naturalization
- Military
- Probate
- Land

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Vital Records

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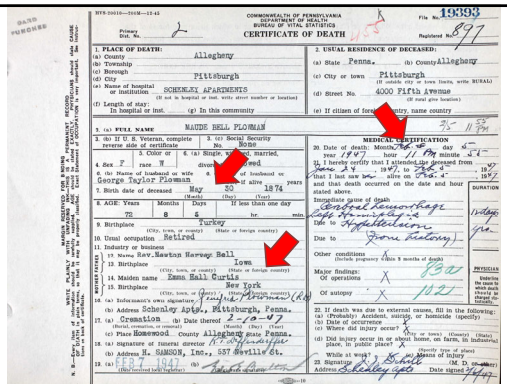

COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF HEALTH
BUREAU OF VITAL STATISTICS
CERTIFICATE OF DEATH

File No. 19393
Registered No. 897

1. PLACE OF DEATH: (a) County Allegheny (b) Township (c) Borough (d) City Pittsburgh (e) Name of hospital or institution SCHENLEY APARTMENTS (If not in hospital or inst. write street number or location) (f) Length of stay: In hospital or inst. (g) In this community

2. USUAL RESIDENCE OF DECEASED: (a) State Penna. (b) County Allegheny (c) City or town Pittsburgh (If outside city or town limits, write RURAL) (d) Street No. 4000 Fifth Avenue (If rural give location) (e) If citizen of foreign country, name country

3. (a) FULL NAME MAUDE BELL FLOWMAN (b) If U. S. Veteran, complete reverse side of certificate (c) Social Security No. None

4. Sex F Color or race W (a) Single, married, widowed, or divorced (How long) (b) Name of husband or wife George Taylor Flowman (If married, widowed, or divorced) (c) Age of husband or wife if alive years

7. Birth date of deceased May 30 1874 (Month) (Day) (Year)

8. AGE: Years 72 Months 8 Days 5 If less than one day hr. min.

9. Birthplace Turkey (City, town, or county) (State or foreign country)

10. Usual occupation Retired 11. Industry or business

12. Birthplace Rev. Newton Harvey Bell Iowa (City, town, or county) (State or foreign country)

13. Maiden name Emma Ball Curtis 14. Birthplace New York (City, town, or county) (State or foreign country)

15. Informant's own signature Jennie Flowman (Rel) (b) Address Schenley Apts., Pittsburgh, Penna.

16. (a) Cremation (b) Date buried 2-9-47 (Burial, cremation, or removal) (Month) (Day) (Year) (c) Place Homewood County Allegheny State Penna.

17. (a) Signature of funeral director [illegible] (b) Address H. SIMSON, Inc., 537 Seville St.

18. (a) FEB 7 1947 (b) [illegible] (Registrar's Signature)

MEDICAL CERTIFICATION

19. Date of death: Month Feb. Day 6 year 1947 hour 11 PM minute 54

20. I hereby certify that I attended the deceased from June 24 1946 to Feb. 6 1947 that I last saw him alive on Feb. 4 1947 and that death occurred on the date and hour stated above.

Immediate cause of death: (a) Cerebral Hemorrhage (b) Hypertension (c) [illegible] DURATION (a) 1 day (b) yrs. (c) yrs.

Due to (Some history)

Other conditions (Include pregnancy within 3 months of death) X

Major findings: Of operations 830 Of autopsy X 1022

PHYSICIAN: Underline the cause to which, in your opinion, death is to be charged in item 21.

22. If death was due to external causes, fill in the following: (a) (Probably) Accident, suicide, or homicide (specify) (b) Date of occurrence (c) Where did injury occur? X (City or town) (County) (State) (d) Did injury occur in or about home, on farm, in industrial place, in public place? X (Specify type of place) While at work? X How? (e) Nature of injury

23. Signature [illegible] M. D. Address Schenley Apts. Date signed 2-7-47

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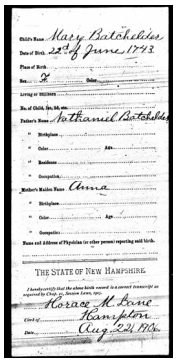
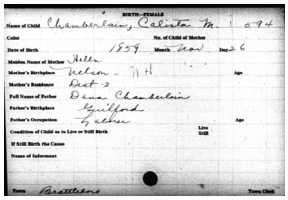
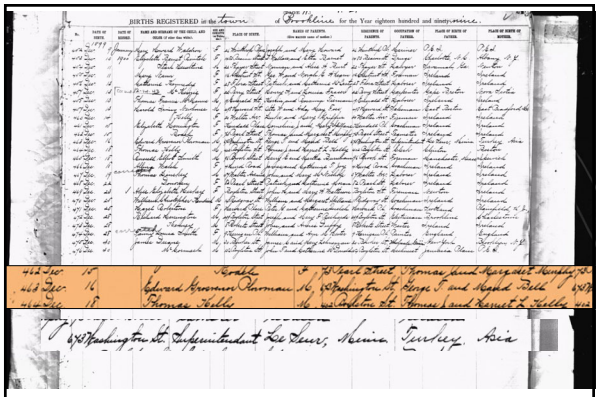

Child's Name Mary Batchelder
Date of Birth 22d of June 1743
Father's Name Nathaniel Batchelder
Mother's Maiden Name Anna
THE STATE OF NEW HAMPSHIRE
Horace M Paine
Hampton
Aug 22d 1893

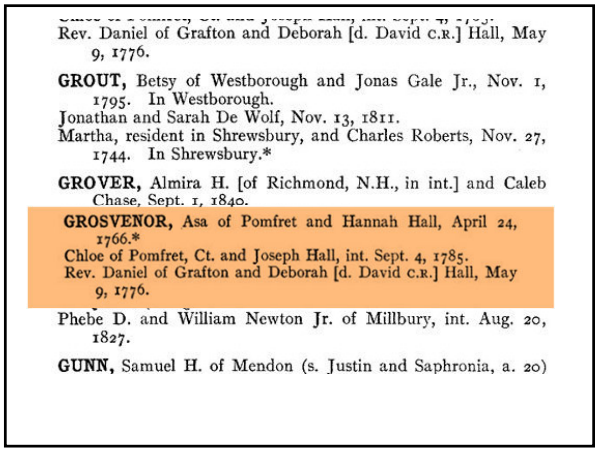

BIRTHS—FEMALE
Name of Child Chamberlain Calista M.
Color
Date of Birth 1859 Month Nov Days 6
Maiden Name of Mother Miller
Mother's Birthplace Nelson
Mother's Residence Dist 2
Full Name of Father Dana Chamberlain
Father's Birthplace Guilford
Father's Occupation Farmer
Condition of Child as to Live or Still Birth
If Still Birth the Cause
Name of Informant
Town Brattleboro

Vital Records – pre 1906

61


BIRTHS REGISTERED in the Town of Brookline for the Year eighteen hundred and ninety-nine.

62


Rev. Daniel of Grafton and Deborah [d. David C.R.] Hall, May 9, 1776.

GROUT, Betsy of Westborough and Jonas Gale Jr., Nov. 1, 1795. In Westborough.
Jonathan and Sarah De Wolf, Nov. 13, 1811.
Martha, resident in Shrewsbury, and Charles Roberts, Nov. 27, 1744. In Shrewsbury.*

GROVER, Almira H. [of Richmond, N.H., in int.] and Caleb Chase, Sept. 1, 1840.

GROSVENOR, Asa of Pomfret and Hannah Hall, April 24, 1766.*
Chloe of Pomfret, Ct. and Joseph Hall, int. Sept. 4, 1785.
Rev. Daniel of Grafton and Deborah [d. David C.R.] Hall, May 9, 1776.

Phebe D. and William Newton Jr. of Millbury, int. Aug. 20, 1827.

GUNN, Samuel H. of Mendon (s. Justin and Saphronia, a. 20)

63

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Vital Records Caveats

- Birth, marriage, and death records
- Often provide the names of the individual's parents and/or spouse
- Depending on the state, records may be held on the state, county, and/or town/city level
- Privacy restrictions may limit access

64

Vital record substitutes

- VRs are not widely available until late-19th/20th century records
  - Exceptions: New England, NYC, New Orleans
- Use substitute records when VRs don't exist
  - Church records (baptism, marriage, burial)
  - Cemetery transcriptions and records (birth, death/burial)
  - Newspapers (birth and marriage announcements, obituaries)
  - Probate records (death)

65

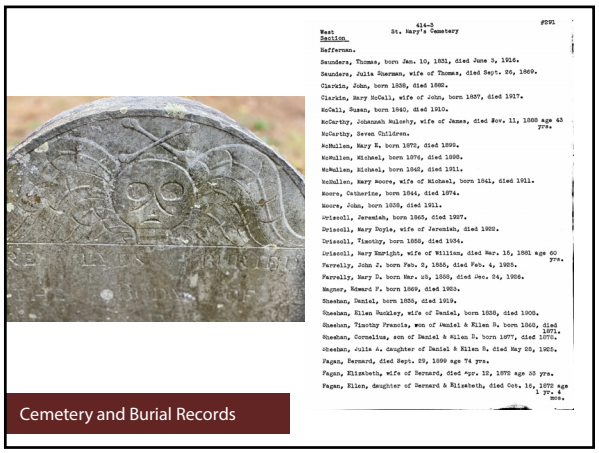
194 RECORDS OF THE OLD SOUTH CHURCH IN BOSTON

Sarah, of Daniel & Mary Haden
June 10 Abigail, of Nathan & Mary Foster
Jeremiah, of Joseph & Sarah Belknap
Abigail, of Josiah & Abigail Waters
Ann, of James & Ann, Negroes
17 Susanna, of Thomas & Elisabeth Dawes
July 8 William, of Cary & Mehetabel Harris
15 John, of John & Mary Dinsdall
22 Benjamin-Belcher, of Isaac & Hannah Cazno
Nathaniel, of Josias & Sarah Nottage
James & Benjamin, of John & Hannah Allen
29 Mary, of Josiah & Ann Torrey
Augt 5 Eleazer, of Reuben & Hannah Higgins
George, of John & Ruth Roulstone
19 Clement, of Joseph & Susanna Jackson
Augt 26 Mary, of William & Mary Pitman
Sept 2 Ann, of John & Jane Doane
Mary, of Silas & Hannah Ivory
Ann, of Bartholomew & Elisabeth Kenny
23 John, of John & Dorcas Brewer
Joatha, of Prince & Mary Winborn
30 Henry, of John & Ann Crumpston
Octr 7 Charlotte, of Benjamin & Margaret Green
Baker, Negro Servant to Mr Joseph Jackson
21 Abigail, of Moses & Elisabeth Peck
28 Mary, of Robert & Lydia Price
Peter, of Isaac & Elisabeth Vergoose
Novr 4 Mary, of Peter & Hannah Roberts
Susanna, of William & Susanna Breed
Decr 2 Benjamin, of Isaac & Sarah Walker
Robert, of William & Rebecca Hoxes
9 Sarah, of Michael & Mary Row
16 Daniel, of George & Abigail Hewes
30 Moses & Benjamin, of Moses & Mary Eayres

1744/5
Janr 6 William, of Abraham & Mehetabel Tuckerman
13 Mary, of Luke & Mary Roberts
27 Jonathan-Clarke, of Ezekiel & Jane Lewis
Febr 10 John, of David & Sarah Jeffries
Febr 10 Sarah, of John & Sarah Hunt
John Hunt Junr
Mary, of Samuel & Mary Hallowell
John, of Thomas & Sarah Foster

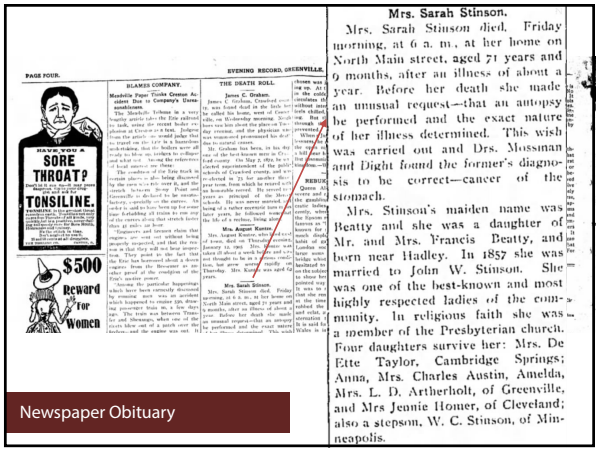
Church Records

66



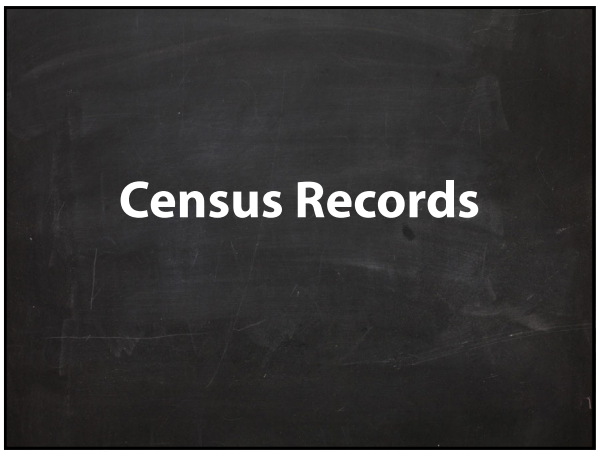
Cemetery and Burial Records

67



Newspaper Obituary

68



69

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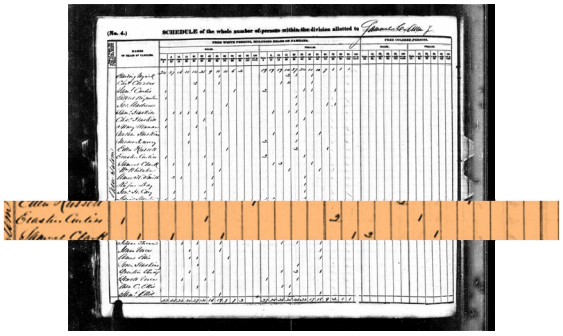
Tip

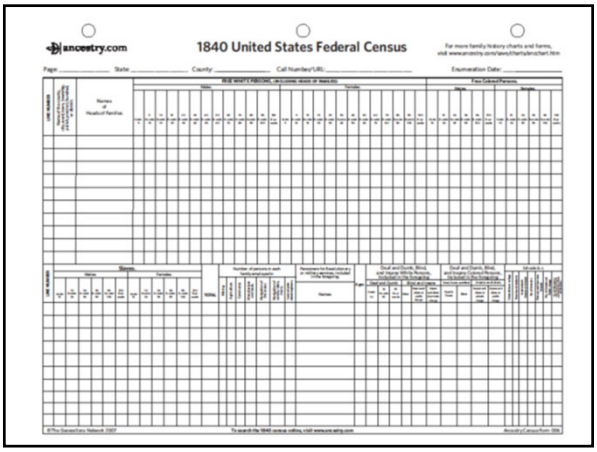
Use Census to Anchor Your Ancestor to a Place and Time

70



1840 Census Record

71



72

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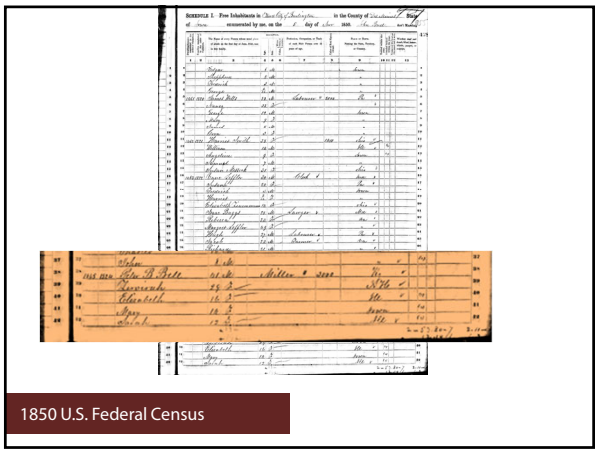
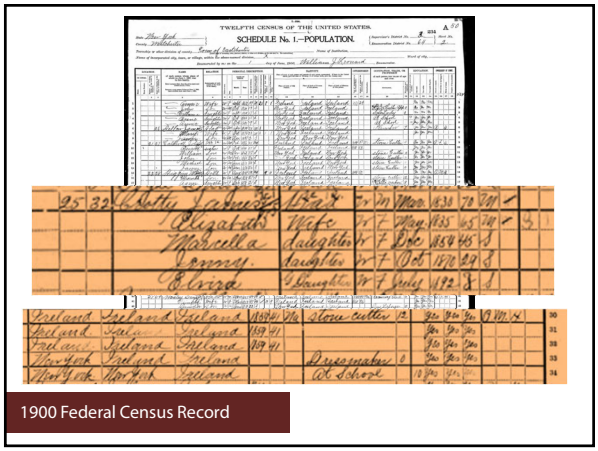


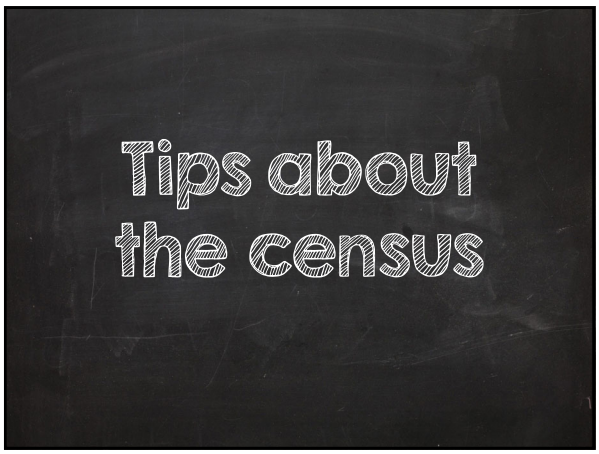
1850 U.S. Federal Census

73



1900 Federal Census Record

74



75

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Census Taker

- Didn't have to talk to anyone in the house
- Could talk to a neighbor if no one home
- What we view are copies of originals
- Families were not asked to spell their name

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Knowing the Family

- 1790–1840: lists only the name of the head of the household
- 1850–1870: lists everyone in household, but not how they are related
  Generally, can assume people in same household are family
- 1880–1940: relationships listed

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Using Census Records

- Try and locate the family in each census record, working backwards in to (1940 to 1930 to 1920, etc.)
- Mistakes/errors are relatively common
  - Give leeway when it comes to ages and spellings
- Use occupation to help confirm the identity
- Look at surrounding families as possible relatives and associates
- Blank census forms available from NARA at https://www.archives.gov/research/genealogy/charts-forms

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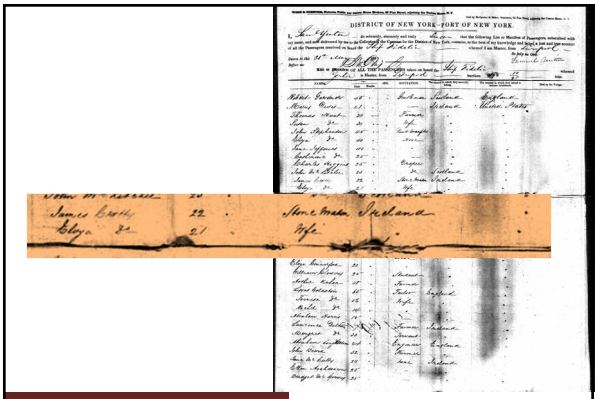
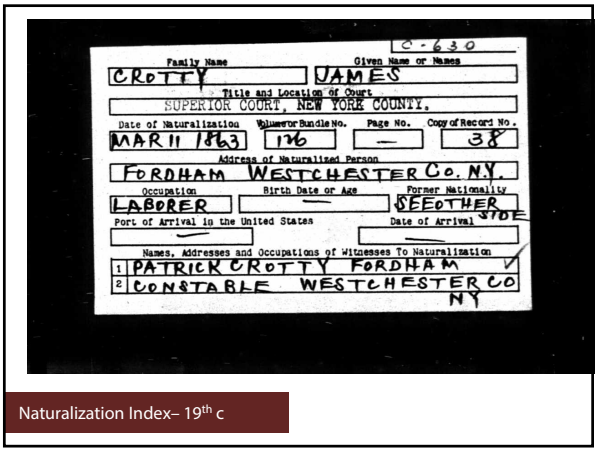
Immigration Records

79



Ship Passenger Records

80



Naturalization Index– 19th c

81

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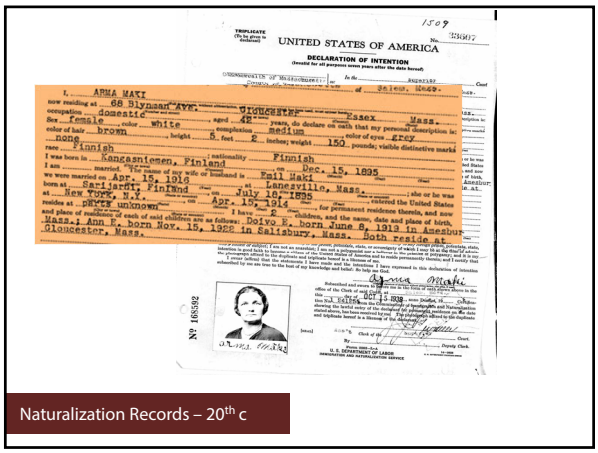

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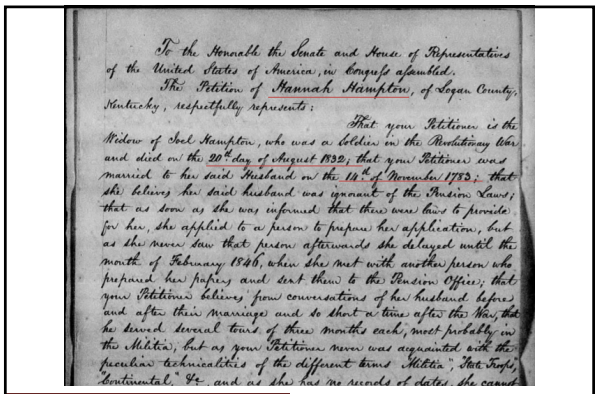
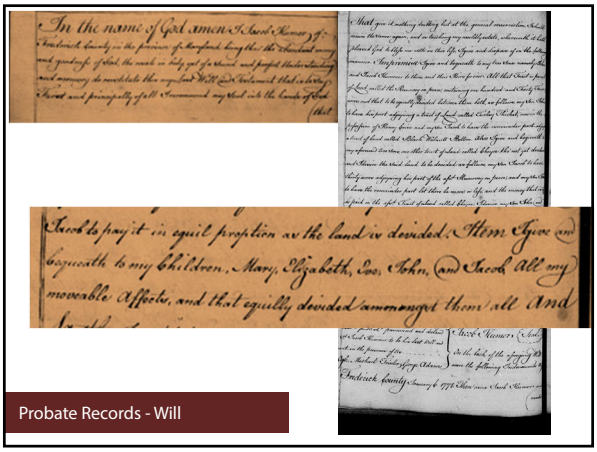

To the Honorable the Senate and House of Representatives of the United States of America, in Congress assembled.
The Petition of Hannah Hampton, of Logan County, Kentucky, respectfully represents:
That your Petitioner is the Widow of Joel Hampton, who was a Soldier in the Revolutionary War and died on the 20th day of August 1832; that your Petitioner was married to her said Husband on the 14th of November 1783; that she believes her said husband was ignorant of the Pension Laws; that as soon as she was informed that there were laws to provide for her, she applied to a person to prepare her application, but as she never saw that person afterwards she delayed until the month of February 1846, when she met with another person who prepared her papers and sent them to the Pension Office; that your Petitioner believes from conversations of her husband before and after their marriage and so short a time after the War, that he served several tours of three months each, most probably in the Militia, but as your Petitioner never was acquainted with the peculiar technicalities of the different terms "Militia", "State Troops", "Continental," &c. and as she has no records of dates she cannot

Military Records - Pension

85

Probate and Land

86


In the name of God amen I Jacob Hamer of Frederick County in the province of Maryland being the [illegible] and good use of God, the week in body yet of a sound and perfect Understanding and memory do constitute this my last Will and Testament that is to say Thirst and principally of all I recommend my Soul into the hands of God (that

Jacob to pay it in equil proption as the land is devided. Item I give and bequeath to my Children, Mary, Elizabeth, Eve, John, and Jacob all my moveable Affects, and that equilly devided amongst them all And

Probate Records - Will

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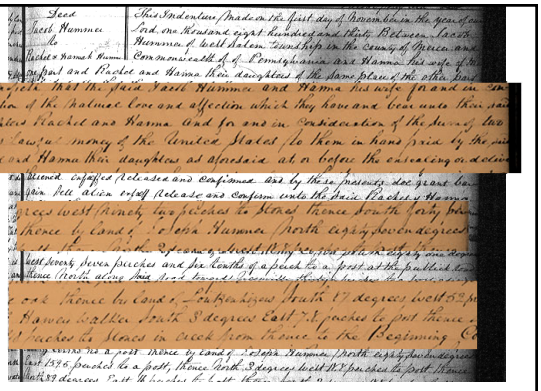
Probate Boilerplate

- "In the name of God, Amen I [name] of [County] in [State/Province] being thro' the abundant mercy and goodness of God, tho weak in body, yet of a sound and perfect understanding and memory do constitute this my Last Will and Testament…."
- "Then came [name 1] and [name 2] the subscribing witnesses to the Last Will and Testament of [name] late of [place name] deceased and made under oath on the Holy Evangels of God that they did see the testor therein named sign and seal this will….."

88



Land Records

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Page 2 of Land Record

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Other Sources of Information

Finding Aids

- Published genealogies
- Town and county histories

Census substitutes

- Tax records
- City directories

Town records

And more!

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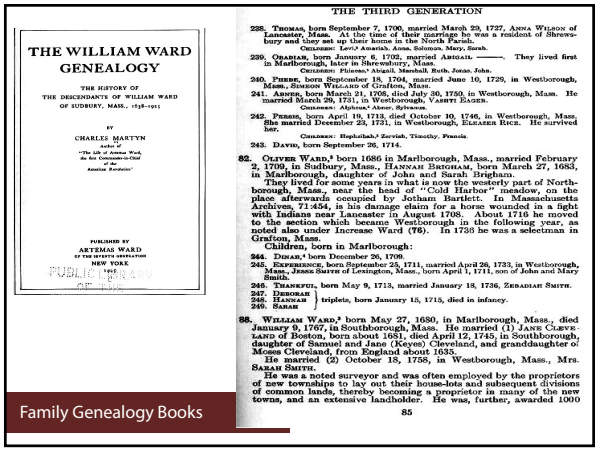
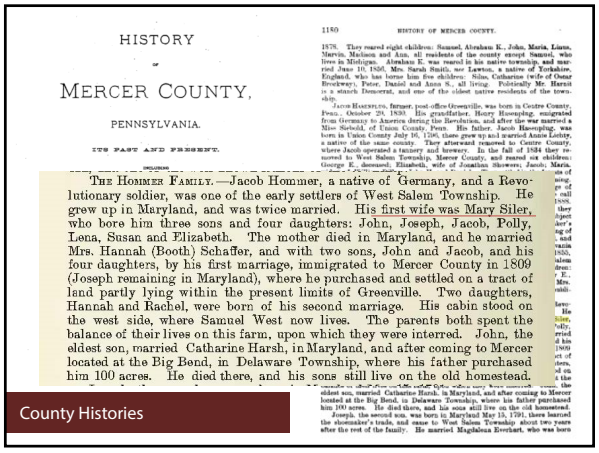


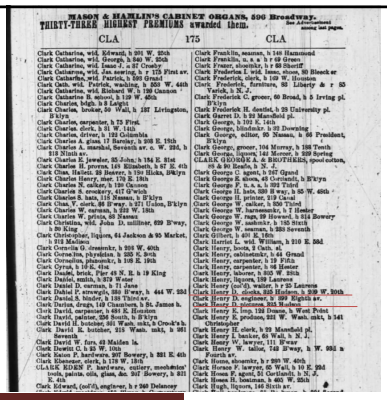
Family Genealogy Books

92



County Histories

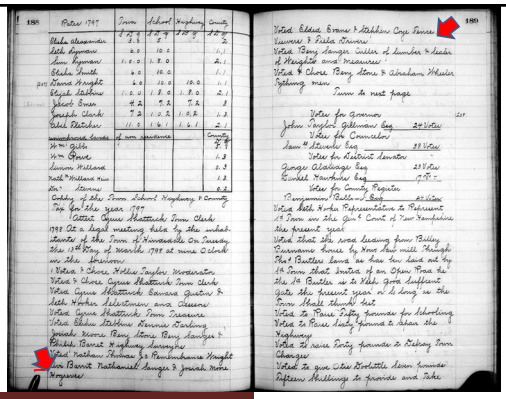
93



City Directories

1866 NYC Directory

94



Town Records

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Review

1. Key Records include
   a) Vital Records
   b) Census Records
   c) Passenger Records
2. May Need Vital Record Substitutes
   a) Church Records
   b) Newspapers
3. Census Substitutes
   a) City Directories
   b) Tax Records

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Next Time: Power Online Searching

- Getting the most from the Big Three

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Next Time: How To Organize?

- Organize your research
- Organize your findings
- Organize your files
- Genealogical numbering systems

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Session Roadmap

- What is Genealogy?
- Steps for Researching
- Focus on step three: sources
- Homework

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Homework

1. Fill out a 5-generation pedigree chart for your family.
2. Identify three things you would like to know about your family based on your chart.
3. Create three research questions, keeping in mind that good questions are about identity, relationships, or events. Anchor each question to a time and a place and include that information in the question.
4. Complete the table below for the three questions.

Research Question	List THREE different records that may help answer the question	Where will you find the record? (What repository?)
1.		

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