

1



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Research Plan

- A roadmap for research
- Statement or question that defines your research goal AND strategy outlining steps to achieve your research goal.
- *Can be* a formal statement or document but *does not have to be*.



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Why create a plan?

- Allows for focused, directed research
- Removes the intimidation factor from “not knowing where to start” or “not knowing how to continue”
- Sets up good research habits and practices



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Components of a Research Plan

-  A general goal/research question (*What am I trying to find?*)
-  Specific research objectives/research strategy (*How am I going to find it?*)
-  List of repositories (*Where will I look?*)
-  List of potential records and sources (*Where will I look?*)

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Finalizing the Steps

1. Organize
2. Define your objective
3. List records that will aid in your research
4. Find the resources
5. Research
6. Analyze and make your conclusions

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UoJ I ' q
**Get Organized
(or re-organized)**

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Pick a Format (or two)



The screenshot shows the AmericanAncestors website interface. At the top, there's a navigation bar with 'Search', 'Events', 'Membership', and 'Give'. Below that, the main heading is 'Research Templates'. There are three tabs: 'Family Charts', 'Research Templates', and 'Writing & Publishing'. The 'Research Templates' tab is active, showing a preview of a 'Family Group Sheet' form. The form has columns for names, birth dates, and other details. A brief description of the form is visible on the right side of the preview.

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Five Generation Chart

AmericanAncestors
 www.AmericanAncestors.org

Generation 1: Daniel C. McGearty (1800-1870), Elizabeth McGearty (1800-1870)
 Generation 2: Charles V. McGearty (1820-1890), Elizabeth McGearty (1820-1890)
 Generation 3: Clara McGearty (1840-1910), Elizabeth McGearty (1840-1910)
 Generation 4: Charles McGearty (1860-1930), Elizabeth McGearty (1860-1930)
 Generation 5: Charles McGearty (1880-1950), Elizabeth McGearty (1880-1950)

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Research Logs

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Research Log

AmericanAncestors
 www.AmericanAncestors.org

Source Information	Call Number	Objective	Results
New York City Municipal Deaths, 1750-1960	1323233	Determine the maiden name of Ellen Gullaway	Found her in a burial record, but cannot yet confirm
1880 U.S. Federal Census	ancestry.com	Locate Ellen (Madden) Gullaway living with parents	Could not locate a Mortimer Madden in NY, CT
Stanford, CT Probate District, 1720-1910	F104 S.8 P76	Find nearby members of Ellen (Madden?) Gullaway	Member and name's been added to probate file to be reviewed again
1910 U.S. Federal Census	ancestry.com	Locate Ida Falken	Ida Falken, age 49 (D. in 1900, NY) living in Stamford, CT
1910 U.S. Federal Census	ancestry.com	Locate Emma C Miller	Emma Miller, age 49 (D. in 1901, NY), living in Stamford
"Mrs. Emma Miller", obituary	GenealogyBank.com	Connection between Ida Falken and Emma Miller	Ida Falken is a sister of Emma Miller, no maiden name listed
"News of the City", New Orleans Item	GenealogyBank.com	Maiden name of Ida and Emma	Ida's maiden name, last listed as "Ida Moffatt Falken"
NY Census	ancestry.com	Moffatt family	3 Moffatt brothers, focused on Edward M. Moffatt
Will of Edward M. Moffatt	F104 S.8 P76	Children's names	Daughter Nellie, nickname for Ellen
Charles R. Hale Cemetery Collection	F93 H36 1949	Are the Moffatts buried near the Gullaways?	When same location nearby in the 19th century?

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Pick one format and stick to it

- Family Group Sheets
- 5 Generation Charts
- Customized Spreadsheets
- Genealogical Software
- Database Software

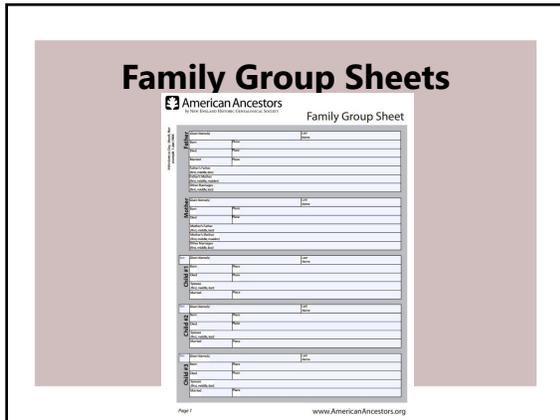
The image shows three examples of genealogical data formats: a Family Group Sheet from AmericanAncestors, a 5-generation chart, and a spreadsheet with columns for names and dates.

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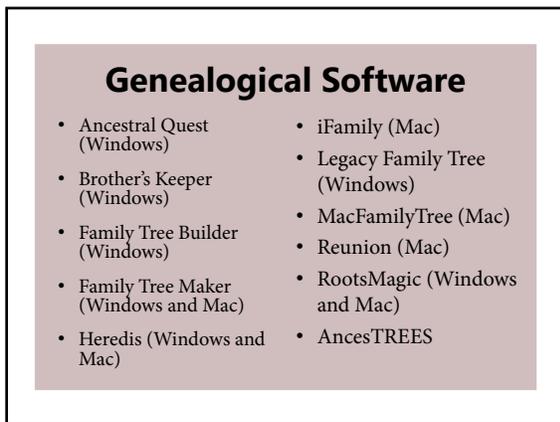
Five Generation (or more) Chart

The image shows a screenshot of a five-generation chart from AmericanAncestors.org. The chart is a tree structure with five levels of generations, showing names and dates for each individual.

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Using Spreadsheets

- Spreadsheets can be helpful with tracking multiple names and help you identify where there may be a relationship in common
- You can add as many columns as needed
- Recommend using color coding or bolding items that are significant to your research.

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FAN Club Spreadsheet

Last Name	First Name	Event	Event Date	Event Relationship	Possible Relationship
Dunn	John	1860 Census	1860	Household resident	Living with his uncle Thomas and his wife Catherine McMorrow
Dunn	John	Baptism	1848	Sponsor is Felix McMorrow	Felix's sister, Catherine is married to John's uncle, Thomas
Dunn	Mary Abby	Marriage to John Kelley	1876	Wife	Her husband may be related to Margaret Kelly, wife of Felix McMorrow

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U b J I ' Z Define Your Objective

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Typical Genealogical Questions

- Questions that center on identity, events, and relationships.
 - Who were the parents of Charles Shaffer?
 - When did Charles Schaffer and Prudence Holland marry?
 - How many children did Charles and Prudence have?

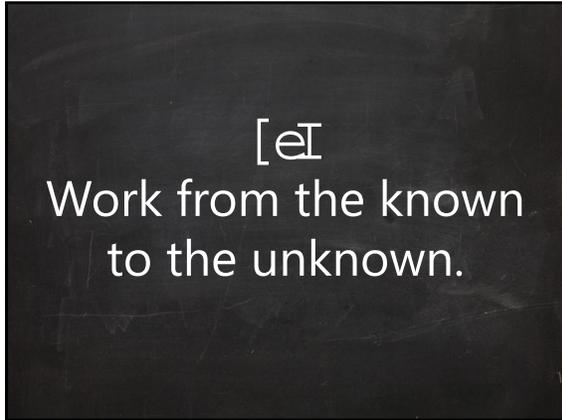


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What information is needed

Information Needed	Search These Records First	Then Search These Records
Age	Census, Vital Records, Cemeteries	Military Records, Taxation
Birth date and place	Vital Records	Cemeteries, Newspapers, Census
Country of foreign birth	Naturalization Records, Vital Records, Census	Military Records, Vital Records, Newspapers
Death date and place	Vital Records, Cemeteries, Probate Records, Newspapers	Newspapers, Bible Records, Military Records
Foreign birth location	Vital Records, Published Genealogies, Biographies, Naturalization, Immigration, Census	Vital Records, Newspapers, History, Emigration and immigration
Immigration date	Census, Immigration, Naturalization	Newspapers, Biographies
Maiden name	Vital Records, Newspapers	Cemeteries, Military Records, Probate Records
Marriage date and place	Vital Records, Census, Newspapers	Cemeteries, Military Records, Probate Records, Naturalization, Land
Parents' names	Vital Records, Census, Probate Records, Newspapers, Published Genealogies	Emigration
Places family has lived	Census, Land, Local Histories, Directories	Military Records, Taxation, Obituaries

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Records

- What is the earliest record that you have located for your ancestor?
 - This will give you a starting point
- What is the last record that you have located for your ancestor?
 - This is not always the end of the trail

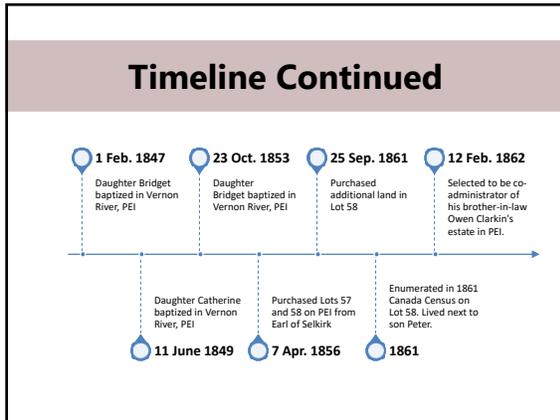
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Use these Records to Create a timeline

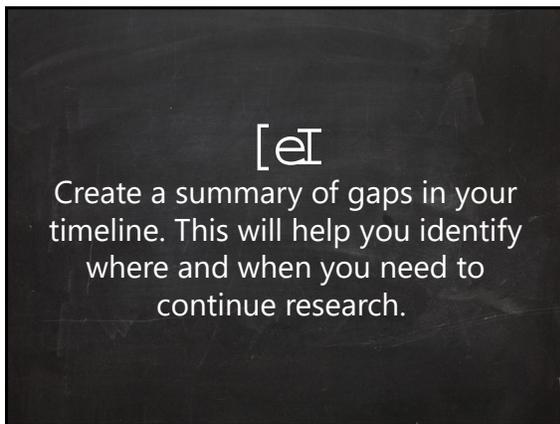
The diagram shows a horizontal timeline with several points marked by blue circles. Above the line, records are listed for 1802, 1829-1833, 1839, and 17 Mar. 1844. Below the line, records are listed for 14 Feb. 1828, 1836, and 29 Aug. 1841.

Date	Record
b. ca. 1802	County Monaghan, Ireland
1829-1833	Sons Owen, Peter, Michael, and Patrick born in County Monaghan, Ireland
1839	immigrated to Prince Edward Island (PEI)
17 Mar. 1844	Daughter Mary baptized in Vernon River, PEI
14 Feb. 1828	m. Catherine Clarkin in Tydavnet, County Monaghan, Ireland
1836	Son Bernard baptized in Tydavnet, County Monaghan, Ireland
29 Aug. 1841	Daughter Margaret baptized in Vernon River, PEI

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Timeline Gaps for 3x Great Grandfather Francis Dougherty

- No record found in Ireland before his marriage in 1828
- No record between 1866 land purchase and 1881 Census
- No U.S. census recording Francis residing in Kansas

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Components of a Research Plan

- A general goal/research question (*What am I trying to find?*)
- Specific research objectives/research strategy (*How am I going to find it?*)
- List of repositories (*Where will I look?*)
- List of potential records and sources (*Where will I look?*)

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Components of a Research Plan

- A general goal/research question (*What am I trying to find?*)
 - Make this question effective and specific: identify a unique individual and identify what exactly you want to learn

Good	Better
What are the origins of Eva Bodnar?	When and where in the Austria-Hungarian Empire was Eva Bodnar (ca. Mar. 1867, Austria - 9 Oct. 1948 Brooklyn, NY) born?

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Components of a Research Plan

- Make this question effective and specific: identify a unique individual and identify what exactly you want to learn

Good	Better
What was the maiden name of Isaac Morris's wife Hannah?	What was the maiden name of Hannah, wife of Isaac Morris (b. 1751 in Bucks Co., PA and d. 1833, Columbiana Co., OH)?

Tree Search

isaac morris

Filters

- Isaac Morris 1751 - 1833
- Isaac Morris 1689 - 1734
- Isaac Morris 1689 - 1734
- Isaac Morris 1796
- Isaac Morris 1792 - 1792

Results 5 of 5

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Components of a Research Plan

- A general goal/research question (*What am I trying to find?*)
- Specific research objectives/research strategy (*How am I going to find it?*)
- List of repositories (*Where will I look?*)
- List of potential records and sources (*Where will I look?*)

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List records that will aid in your research

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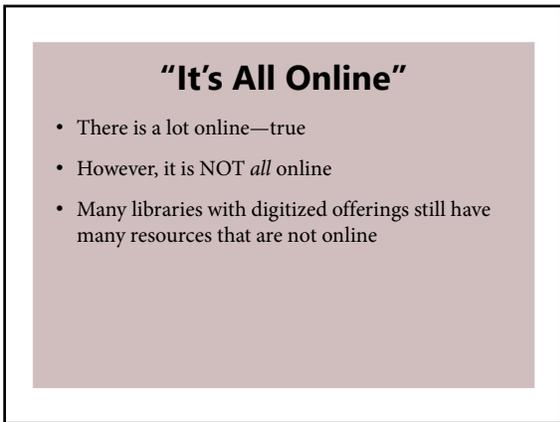
Types of Records

- Vital Records
- Church Records
- Census
- Cemetery Records
- Immigration Records
- Naturalization Records
- Land and Property
- Probate
- Taxation
- Military
- Newspapers
- Compiled genealogies
- Finding aids
- Local histories
- Family papers
- ...and more!

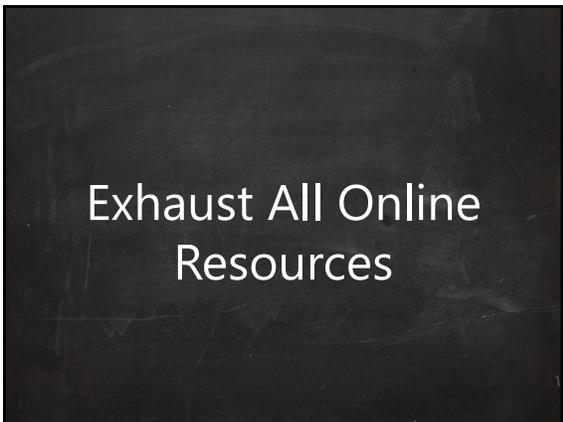
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"Go Shopping"

- This step involves "shopping" for the records that you want to review on your research plan
- The repository = the store
- Records = the items
- Keep in mind the cost involved with getting the records.
 - Can you get them yourself or do you need to hire someone else to get them for you?



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Know What to Expect

- Genealogical resources vary widely by geographical location
 - Applies to both access (privacy, online availability) and to what was created
- Research the town, county, and state where your ancestor lived
 - Date of formation, previous names, boundary changes, land grants
- Research major boundary changes for countries outside the U.S.

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**Know What to Expect:
Repositories**

- State libraries and archives often hold copies of records such as vital records, state census, and state land grants
- Town and city clerks often hold original copies of vital records
- County courthouses and county clerks often have court, land, probate, tax, and naturalization records
- Local and state libraries often have newspapers, published genealogies, and local histories
- Cemetery and church records are harder to track down – could be held at a local or state library, historical society, other institution, or by the creating/governing body
- NARA holds military records, immigration and naturalization, federal census records, and federal land grants

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Resources

- Red Book: American State, County, and Town Resources: https://wiki.rootsweb.com/wiki/index.php/Red_Book:_American_State,_County,_and_Town_Sources
- County guides on FamilySearch Wiki: https://www.familysearch.org/en/wiki/Main_Page
- Atlas of Historical County Boundaries: <https://digital.newberry.org/ahcb/>
- Historical Atlases and Maps of U.S. and States: <https://www.mapofus.org/>
- CDC: Where to Write for Vital Records: <https://www.cdc.gov/nchs/w2w/index.htm>
- U.S. State Census Table: <https://familytreemagazine.com/records/census/state-censuses-list/>
- Vital Records Chart: <https://www.familytreemagazine.com/wp-content/uploads/2017/08/vitalrecords.pdf>

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<http://library.nehgs.org/>

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familysearch.org/wiki

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ATLAS OF HISTORICAL COUNTY BOUNDARIES
 The Newberry Library | Dr. William M. Stoltz Center for American History and Culture

Home Using the Atlas Download Files About the Project Publications

Louisiana

[View Interactive Map](#)

Maps and text covering the historical boundaries, names, organization, and attachments of every county, extinct county and unsuccessful county proposal from the creation of the first county through December 31, 2000. For help with the interactive maps, see our [Using the Atlas](#) page.



64 Counties

[View Index of Counties and Equivalents](#)

Complete index of every county, county equivalent, or other area relevant to the evolution of state and county boundaries; includes extinct and proposed counties, non-county areas, and provides cross references for name changes, and hyperlinks to corresponding entries from the individual County Chronologies. Also accessible from the County Index link at the bottom of the interactive map frame.

[View Consolidated Chronology of State and County Boundaries](#)

Organizes the historical data chronologically, combining all the county events into a single composite entry for each date. Each entry is followed by a citation to the primary source(s) used to determine the change. Also accessible from the Chronologies link at the bottom of the interactive map frame.

[View Individual County Chronologies](#)

Newberry AHCB: Louisiana

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ATLAS OF HISTORICAL COUNTY BOUNDARIES
 The Newberry Library | Dr. William M. Stoltz Center for American History and Culture

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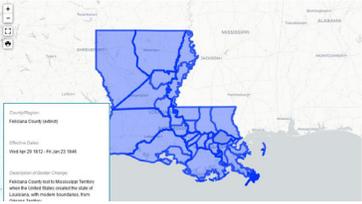
Louisiana

[Back to Louisiana initial page](#)

Historical Borders

Select Date of Border Change:

- 1000-06-15
- 1802-04-30
- 1802-03-04
- 1813-03-29
- 1813-03-24
- 1814-02-28
- 1816-03-04
- 1819-03-06
- 1822-03-23
- 1823-01-17
- 1824-02-17
- 1824-03-07



County/Region:
 Feliciana County (extinct)

Effective Date:
 May 04 1812 - Feb 28 1804

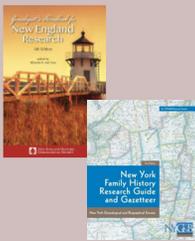
Description of border change:
 Feliciana County lost to Mississippi Territory when the United States ceded the state of Louisiana with revised boundaries from France to Spain.

Newberry AHCB: Louisiana

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Know What to Expect: Regional Resources

- Because records and repositories vary widely based on locality, it can help to consult a regional guide
- Rhonda R. McClure, ed., *Genealogist's Handbook for New England Research* (2021)
- Naomi Joshi, et. al., *New York Family History Research Guide and Gazetteer* (2017)
- Research guides and webinars online at <https://www.americanancestors.org/tools/research-guides>



Newberry AHCB: Louisiana

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Make notes on your research log to indicate record reliability

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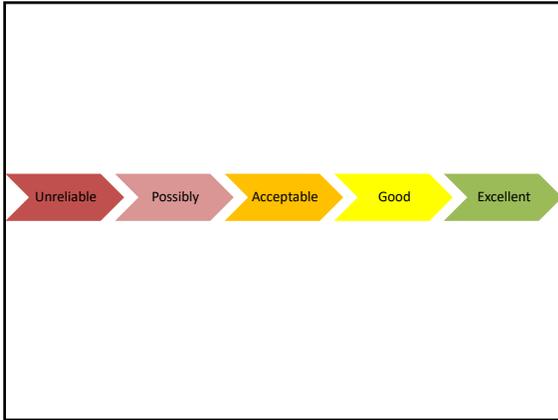
Rating System

- Original > Copy
- Individual reporting> Informant
- Record close to the event> Record far removed from date of the event
- Educated clerk> Uneducated clerk
- Reliable source>uncited source

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Use colors to indicate record strength

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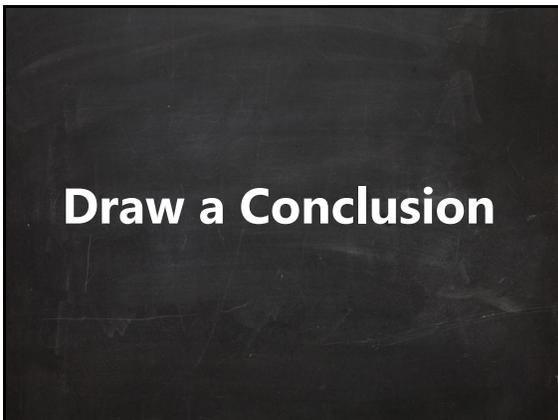


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Return to your Research Log

Source	Name (and exact spelling)	Date established	Place	Relevant Record	Notes	Objective
Birth record	William Henry Brown	Jan 1850	Illinois			Birth record may contain the names of William Henry Brown's parents.
Death record	William Henry Brown	after 1900	Illinois, Effingham, Illinois	yes	Original 19 June 1913 death record indicated WHB was son of Emanuel Brown and Alice Baker. He was born in Jefferson, IL.	Death record may contain the names of William Henry Brown's parents.
Marriage record	William Henry Brown and Emma Massey	28 Dec 1876	Clay City, Clay, Illinois	yes	Does not provide names of parents, however the record does show WHB as resident of Wayne County and Emma from Clay County, IL.	Marriage record may contain the names of William Henry Brown's parents.
Census Records						
1900 United States Federal Census (www.ancestry.com)	Charles Brown/William Henry Brown/Emma O'Leary Brown	1900	Leland, Wayne, Illinois	yes	Enumerated with both place Illinois. In 1890 Married 1877 Father born Ohio. Mother born Tennessee.	Determine place and approximate year of birth to help narrow our search for a vital record.
1880 United States Federal Census (www.ancestry.com)	Charles Brown/William Henry Brown/Emma O'Leary Brown	1880	Leland, Wayne, Illinois	yes	Enumerated with both place Illinois, about 1850. Father born Ohio. Mother born Tennessee.	Determine place and approximate year of birth to help narrow our search for a vital record.
Newspapers						
Obituary for William Henry Brown	William Henry Brown	1913	Illinois, Effingham, Illinois	yes	Named his parents Emanuel Brown and Alice Baker.	Obituary may name WHB's parents death date/place if necessary for a further search.
Published Genealogies						
Wayne County Illinois - Local Histories (1878-80)	Emanuel and/or William Henry Brown	1840's-1920's	Wayne County, Illinois	yes	Named his parents Emanuel Brown and Alice Baker and identified his grandparents and great-grandparents.	Because of the popularity of the Brown surname, we need more information to narrow our catalog search for a published genealogy; however, we might find a local history.

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Know When to Stop

- Set Limits
- Stay Organized
- Trust Your Research
- Be Creative, Not Crazy
- Set Realistic Goals



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Record Analysis

- Review what you've found – don't just read, examine
 - Does the record bring up new questions?
 - How accurate is the record?
 - How accurate is the source?
- Analyze sets of records
- Record the information you have
- Record the sources you used

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Principles of Analysis

- Are you looking at an original or derivative source?
- When was the record created, i.e. how soon after the event it is capturing?
- Who created the record? 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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Research Plan Review

- Define your goal – come up with an effective and specific research question
- Know what to expect – familiarize yourself with what is available
- Find the resources - locate repositories and perform your research
- Record your work – keep track on a research log
- Analyze and summarize – review your work

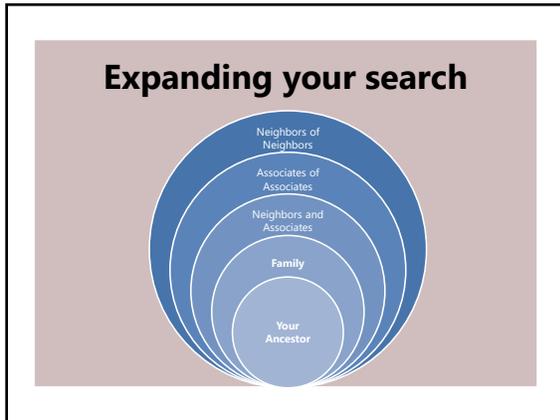
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Activity #1
Let's Make a Plan

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1900 US Federal Census, Reading, Mass.

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F.A.N

- Family
 - Who are the other family members listed with Annie?
 - What records for the family members could help to determine maiden name?
 - Update your Research Log with these records.

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What will help us find what we are looking for?

Information Needed	Search These Records First	Then Search These Records
Age	Census, Vital Records, Cemeteries	Military Records, Taxation
Birth date and place	Vital Records	Cemeteries, Newspapers, Census
Country of foreign birth	Naturalization Records, Vital Records, Census	Military Records, Vital Records, Newspapers
Death date and place	Vital Records, Cemeteries, Probate Records, Newspapers	Newspapers, Bible Records, Military Records
Foreign birth location	Vital Records, Published Genealogies, Biographies, Naturalization, Immigration, Census	Vital Records, Newspapers, History, Emigration and Immigration
Immigration date	Census, Immigration, Naturalization	Newspapers, Biographies
Maiden name	Vital Records, Newspapers	Cemeteries, Military Records, Probate Records
Marriage date and place	Vital Records, Census, Newspapers	Cemeteries, Military Records, Probate Records, Naturalization, Land
Parents' names	Vital Records, Census, Probate Records, Newspapers, Published Genealogies	Emigration
Places family has lived	Census, Land, Local Histories, Directories	Military Records, Taxation, Obituaries

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Group Work Review

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William Ellis

William Ellis Death Certificate, Reading, Mass., 1904

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George Ellis

No.	DATE AND PLACE OF MARRIAGE	DATE OF BIRTH	NAME, RESIDENCE AND STATE OF FATHER	NAME, RESIDENCE AND STATE OF MOTHER	RESIDENCE OF BRIDE	AGE OF BRIDE	NAME OF GROOM	RESIDENCE OF GROOM	WEDDING PLACE	NAME, RESIDENCE AND OFFICIAL POSITION OF MINISTER OF THE GOSPEL
19	April 23rd Reading, Mass.	April 23rd	Joseph M. ...	...	Reading, Mass.	24	...	...	...	...
20	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
21	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
22	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
23	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
24	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
25	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
26	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
27	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
28	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
29	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
30	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
31	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
32	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
33	April 23rd Reading, Mass.	April 23rd	...	...	Reading, Mass.	24	...	...	...	...
34	April 23rd Reading, Mass.	April 23rd	Reading, Mass.	24

George Ellis Marriage, Reading, Mass., 1897

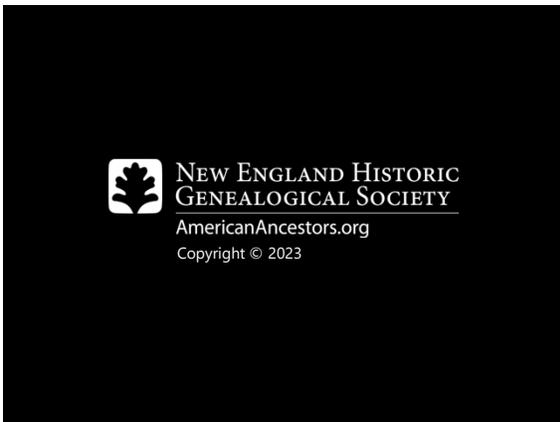
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