

# Expert Strategies for Breaking Down Genealogical Brick Walls

## *Class 5: Origins and Migrations*

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**\*\*Recommended free webinar that complements this class:** (available here:

<https://www.americanancestors.org/video-library/setting-yourself-success-organizational-tools-and-tips-break-down-brick-walls>)

- Setting Yourself Up for Success: Organizational Tools and Tips to Break Down Brick Walls, presented by Senior Genealogist Rhonda R. McClure

### **Step #1- Organize your previous research into an annotated research log**

Use an annotated research log to record data. Blank templates can be found at American Ancestors:

<https://www.americanancestors.org/tools/research-templates>

### **Step #2- Look for missing information and identify your goal**

Once you have organized your previous research, you must then determine what information is missing.

Define what you are looking for, such as:

- Birth date/place
  - Marriage date/place
  - Death date/place
  - Maiden name
  - Military service
  - Parent's names
  - Parent's place of birth
  - Immigration year
  - Naturalization status
  - Sibling's names
  - Children's names
- Next, determine what individuals or families intrigue you the most. Remember—it is best to tackle one line at a time.
  - Create a list of questions or objectives to research. Include these objectives on your research log, even before you begin your research.

### **Step #3- Who's your F.A.N. club?**

#### **Locating FAMILY (F) in Records- What to Note**

##### **Cemetery Records**

- Individuals buried around your ancestor
- Information on burial cards

##### **Census Records**

- All persons enumerated in a household
- Birthplaces



**American Ancestors**  
by NEW ENGLAND HISTORIC GENEALOGICAL SOCIETY

- Other households of the same surname living in the same town/county
- Similar profession

#### **Church Records**

- Religious affiliation
- Admission to church
- Witnesses of baptisms/marriages

#### **City Directories**

- Other households of the same surname living on the same street/town/city
- Individuals with similar professions (skilled work)

#### **Local Histories/Genealogies**

- List of early/prominent settlers
  - When they came to the area
- Individuals with similar origins
- Individuals with similar vital and genealogical information

#### **Land Records**

- Frequent land transactions between the same individuals
- Frequent use of same witnesses
- Large amount of land sold for little money
- The phrase “in consideration of love and affection”

#### **Naturalization Records**

- Individuals with a similar birthplace or surname
- Individuals with a similar occupation
- Same Address
- Familiar witnesses

#### **Newspaper Articles/Obituaries**

- Obituaries can provide information on next of kin
- Society section
  - Individuals visiting family members
  - Participants in a wedding ceremony

#### **Probate Records**

- Wills listing heirs or administrators
- Division of Estate may list heirs, though no relationship may be listed
- All records in a probate file are important, including debts and credits

#### **Town Records**

- Other individuals or families who arrived in an area around the same time
- Individuals and families with the same surname

## Locating ASSOCIATES (A) in Records: What to note

### Religious

- Pastors/ministers/priests/rabbis, etc. who serve in your ancestor's parish/congregation
- Witness to religious family events
- Godparents included on baptismal, confirmation, marriage, and burial records
- Individuals and families belonging to the same church organization

### Educational

- People who graduated in the same class
- Participants in the same sports or clubs
- Friends that signed your ancestor's yearbook
- Teachers or professors in their field at the time they attended
- Colleagues that published with an ancestor

### Occupational

- Individuals with similar professions (skilled work)
- Employees and owners of the institutions where your ancestor worked
- Labor Unions or Workmen's Organizations your ancestor supported

### Social

- Individuals belonging to the same:
  - Fraternal organizations
  - Genealogical organizations
  - Hobbies and/or hunting organizations

### Political

- Political organizations your ancestor supported
- Tribal affiliations
- Loyalists (during American Revolution)

### Place and/or migration

- Did your family reside in the same place for several generations? What other families did as well?
- Did your family migrate somewhere? What other families made the same migration?

## Locating NEIGHBORS (N) in records- What to note

### Military Pensions

- Affidavits of fellow soldiers
- Search for your ancestor, as they may have provided an affidavit for another soldier
- Witnesses providing testimony

### **Town Records**

- Other individuals or families who arrived in town at the same time
- Others included on a list of proprietors
- Plot maps may identify your ancestor and reveal neighbors

### **Diaries and Day Books**

- Your ancestor may not be named, but you will learn more about the community
- Often include birth, marriage, and death information for those of the town (and surrounding towns)
- Biographical information of residents
- Movements of neighbors
- Notable events

### **Church Records**

- Pew rentals and church seating plans
- Admission lists or parish membership
- Nearby cemetery or burial plots in the church cemetery

### **Probate Records**

It is very important to examine all documents and determine the relationship between your ancestor and these individuals.

- Who was the administrator?
- Who was the bondsman?
- Who were the estate appraisers?
- Who witnessed the will?
- Which individuals appear on multiple occasions?

## **Step #4- List records that will aid in your research**

List records that will aid in your research-

- Census (Federal and State)
- Vital Records (Birth, Marriage, Death)
- Church Records
- Land Records (Federal, State, County)
- Court Records (Probate, Civil, Criminal)
- Newspapers (obits, wedding notices)
- Naturalization records or Passenger Lists
- City Directories

A helpful chart identifying these records be found at American Ancestors-

<https://www.americanancestors.org/education/learning-resources/read/getting-started>

Find resources in repositories and online-

- Check both the online and physical holdings

- Contact historical societies, lineage societies, local libraries, genealogical societies, colleges and university archives, federal and state archives, town halls, etc. A great resource for manuscript collections can be found at ArchiveGrid: <https://beta.worldcat.org/archivegrid/>

Map out your plan of action: Use an Annotated Research Log to keep an organized list of the resources that you checked or the resources that you plan to check:

<https://www.americanancestors.org/tools/research-templates>

## Step #5- Locate the resources

Educate yourself-

- Digitized Books:
  - <https://www.hathitrust.org/>
  - <https://books.google.com/>
  - <https://archive.org/index.php>
  - <https://openlibrary.org/>
  - <https://books.familysearch.org>
  - <http://library.si.edu/digital-library>
- Guide books:
  - Rhonda R. McClure, 6<sup>th</sup> ed., *Genealogist's Handbook for New England Research*, 6<sup>th</sup> ed. (Boston: NEHGS, 2021)
  - *Red Book: American State, County, and Town Sources*, 3rd ed. (Ancestry Publishing, 2004)
  - *The Source: A Guidebook to American Genealogy*, 3rd ed. (Ancestry Publishing, 2006)
  - *New York Family History Research Guide and Gazetteer*, 1st ed. (New York Genealogical and Biographical Society, 2015)
- Portable Genealogists
  - [Immigration to the U.S.](#)
  - [U.S. Naturalization](#)
  - [NY State Census](#)
  - [MA State Census](#)
  - [Using the Federal Census: 1790-1840](#)
  - [Using the Federal Census: 1850-1940](#)
  - [Organizing your Research](#)
  - [Problem Solving in Irish Research](#)
  - [17<sup>th</sup> Century New England Research](#)
  - [Using DNA in Genealogy](#)
  - [African American Resources](#)
  - [Applying to Lineage Societies](#)
  - [Building a Genealogical Sketch](#)
  - [Genealogical Numbering](#)
  - [Editorial Stylesheet](#)
  - [Reference Notes](#)
  - [Indexing](#)
- Research Guides: <https://www.americanancestors.org/tools/research-guides>
- Family Search Wiki: [https://www.familysearch.org/wiki/en/Main\\_Page](https://www.familysearch.org/wiki/en/Main_Page)
- American Ancestors Webinars
  - Upcoming- <http://www.americanancestors.org/Education/Online-Classes/>
  - Archived- <https://www.americanancestors.org/video-library>



## Step #6- Research

Perform the research as defined in your plan. Remember, the research plan is fluid, not absolute.

- Return to your original research plan to locate any holes or missed opportunities
- Be patient and open to alternative record groups and/or people of interest. For example, you may find more Family, Associates, and/or Neighbors of your ancestor (known as the F.A.N.) once you start the research process:

## Step #7- Analyze and Draw your Conclusions

**Write it down! Update your annotated research log with your notes and conclusions. If a longer explanation is required, consider using these resources:**

### American Ancestors Resources

Writing and Publishing Guide, <https://www.americanancestors.org/education/learning-resources/read/writing-publishing>

*Portable Genealogist Compilation: Writing*, This easy-to-use compilation includes seven guides to help with your genealogical writing: *Building a Genealogical Sketch*, *Genealogical Numbering*, *Editorial Stylesheet*, *Reference Notes*, *Indexing*, and *Compiling a Bibliography*, plus *Applying to Lineage Societies*.

Robert Charles Anderson, *Elements of Genealogical Analysis: How to maximize Your Research Using the Great Migration Study Project Method*, (Boston, Massachusetts: New England Historic Genealogical Society, 2014)

Penelope L. Stratton and Henry B. Hoff, *NEHGS Guide to Genealogical Writing* (Boston: NEHGS, 2014)

### “Follow the Money Approach”

- When vital records do not exist or have significant gaps, we turn to financial records to learn more about our ancestors
- This approach can be used to track an individual’s movements through a country or overseas
- It can help clarify relationships between families

### Types of Town Records

- Most town records have been digitized and are available on FamilySearch (note: few are indexed)
- Catalog>Search by Place>Enter name of Town>Search>Town Records
- **Ear Marks and Cattle Marks**
  - Owners mark their cattle and sheep with distinct patterns to prevent against theft
  - The marks were submitted to the town clerk to be registered
  - Marks could be passed down from father to son
  - Only one son could inherit the father’s mark
  - Registered marks could also be sold (part of the owner’s estate)

- **Pauper and Orphanage Records**
  - Town officials were responsible for supporting the poor and orphaned children
  - Guardians may be appointed to care for orphans who were heirs to property
  - Orphaned children may be “bound out” to learn a trade or sent to an institution like an orphanage
- **Indenture Agreements**
  - Legal contracts made between an indentured servant and an employer “master”
  - Outlines the duration of servitude and the rules that the servant and master will abide by

## Land Records

- Use census records, including the non-population schedules to identify ancestors who owned land
- **Deeds**
  - Legal document transferring ownership of property from one person to another
  - Grantor = seller
  - Grantee = buyer
  - Kept at the county level
  - Connecticut, Vermont and Rhode Island are stored at the town level
  - Tip: If the deed sale is less than \$1, this indicates a relationship between both parties
- **Homestead Act of 1862**
  - Signed in 1862, this law allowed any American (including freed slaves) to purchase up to 160 acres of federal land
  - Buyer was required to live on the land and perform necessary upkeep and additions
  - Use the Bureau of Land Management web site to search for land patents in the U.S.
  - Land entry files can be obtained from the National Archives in Washington, D.C. Files are being digitized and added to Ancestry.com at <https://www.ancestry.com/search/collections/60593/>.

## Military Pension and Bounty Land Records

- **Revolutionary War Pension History**
  - 24 August 1780 – Congress passed an act to offer pensions to widows and orphans of Revolutionary War soldiers
  - 1818 – Congress passed a resolution granting pensions to veterans who were not disabled but were having financial difficulties – lifetime pension

- 1832 – Full pay for life to officers and enlisted men who served 2+ years; partial pay for 6 months to 2 years
  - Original files are kept at the National Archives, Washington D.C. (digitized and available on Fold3.com)
- **Pension Roll of 1835**
    - In 1834/1835, the U.S. Senate passed a series of resolutions requiring a list be compiled of pensioners who were drawing pensions for service in the Revolutionary War
    - Some War of 1812 veterans may be listed
    - Most appear in later pension rolls
    - Available on Ancestry at <https://www.ancestry.com/search/collections/60514/>
- **Military Bounty Land**
    - Federal government provided bounty land for those that served in the following wars:
      - Revolutionary War
      - War of 1812
      - Mexican War
      - Indian Wars (1775-1885)
    - Claimed by veterans or their heirs
    - Applications recorded the veteran's age and residence at the time of application
- **Revolutionary War Databases:**
    - U.S. War Bounty Land Warrants, 1789-1858 - <https://www.ancestry.com/search/collections/1165/>
    - United States Revolutionary War Pension and Bounty Land Warrant Magazines, 1800-1900 - <https://www.familysearch.org/search/collection/1417475>
- **War of 1812 Pension History**
    - 1871 Act – provided pensions to veterans who served at least 60 days or to their widows if they married before 1815
    - 1878 Act – provided pensions to veterans or their widows, who served at least 14 days
    - Pension files are being added to Fold3.com
    - For files not available, request from the National Archives, Washington D.C. using the NATF-85 form
    - Link: <https://www.archives.gov/veterans/military-service-records/pre-ww-1-records>

- **Civil War Pensions**

- Federal pensions were granted to Union veterans and their surviving family (spouse, children, parents, dependents)
- Federal pension files are kept at the National Archives, Washington D.C. (widow's pensions being digitized and added to Fold3)
- Use NATF-85 form to request a copy of pension
- Link: <https://www.archives.gov/veterans/military-service-records/pre-ww-1-records>
- Union pensions can be searched in the U.S. Civil War Pension Index (1861-1934) - <https://www.ancestry.com/search/collections/4654/>
- Confederate pensions were granted by the individual states
- Link: <https://www.archives.gov/research/military/civil-war/confederate/pension>

### Probate Records

- **Common Terms:**

- **Testate:** dies with a Last Will & Testament.
- **Intestate/Administration:** dies without a will.
- **File Papers:** the original documents associated with the probate file.
- **Record Books / Copy Books:** copies of certain probate files copied into bound record volumes.

- **Wills**

- A will is a legal document where property is transferred upon the party's death to family, friends, servants, business partners, and the community
- Kept at the county level where the deceased had their primary residence
- Wills can include the following:
  - Names of children (and their spouses)
  - Name of spouse
  - Names of grandchildren, nieces/nephews
  - Names of servants
  - Names of enslaved persons
- **Codicil:** An addition or change to a will

- **Inventories**

- A list of the deceased's belongings and property was taken and distributed to heirs
- Keep note of the persons who took the inventory - they may be family or close friends/business partners

- **Accounts**

- List of debts owed to the estate
- List of debts the estate owes to others



- Published in newspapers
- **Distributions**
  - Dividing an estate among heirs
  - Occurs after bills are paid and debts collected
  - Heirs (children, widow, etc.) mentioned in distribution
  - Genealogical importance:
    - List of children if vital records aren't available
    - Married names of daughters
    - Children of deceased heirs
- **Guardianships**
  - Appointed for minor children
    - Males: under 21
    - Females: under 18
  - Guardians protected the inheritance of minor heirs to an estate
    - Can provide financial support
    - After the minor child becomes of age, the guardian is released
    - Guardian would then make an account of compensation

## Tax Records

- **Poll Tax**
  - Tax levied as a prerequisite to voting
  - Massachusetts was the first to enact the poll tax in 1646, followed by New Haven in 1649
  - Abolished in 1964 when 24th Amendment was passed
- **Taxes on Real and Personal Estates**
  - Tax rolls may detail the type of structures they have on the estate (house, farm, mill, etc.)
- **IRS Tax Assessment Lists**
  - 1 Jul 1862 – Bureau of Internal Revenue was created (later renamed to Internal Revenue Service)
  - The United States was divided into collection districts
  - Two lists created
  - A list of names of individuals subject to taxation who lived in the division
  - A list of names of individuals who lived outside the division but were owners of property in the division

## Employment Records

- Search the catalogue on genealogy web sites and sites like ArchiveGrid to locate employee records that pertain to your ancestor

## Railroad Records

- Pensions granted by the U.S. Railroad Retirement Board starting in 1934
- Ancestry.com has the Pension Index for 1934-1987 - <https://www.ancestry.com/search/collections/61597/>
- Original claim files can be obtained from the National Archives, Atlanta, Georgia - <https://www.archives.gov/atlanta/public/railroad-retirement-board-records>
- Each railroad company has their archives, which may include employee records
  - Ex. Southern Pacific Rail Road - <https://www.ancestry.com/search/collections/2046/>
- U.S., Panama Canal Zone, Employment Records and Sailing Lists, 1884-1937 - <https://www.ancestry.com/search/collections/61857>

## Publications

Grannum, Karen and Nigel Taylor. *Wills & probate records: a guide for family historians* (Kew, England, National Archives, 2009)

Hatcher, Patricia Law. *Locating Your Roots: Discover Your Ancestors Using Land Records* (Cincinnati, Betterway Books, 2003)

Lainhart, Ann S. *Digging for genealogical treasure in New England town records*. (Boston, New England Historic Genealogical Society, 1996)  
<https://shop.americanancestors.org/products/digging-for-genealogical-treasure-in-new-england-town-records-1>

Neagles, James C. *U.S. military records: a guide to federal and state sources, Colonial America to the present*. (Salt Lake City, Ancestry, 1994)

Williams, Elizabeth Thompson. *The Apprenticeship of Children in the New England Colonies* (Boston, Boston University, 1928). Available at Archive.org at <https://archive.org/details/theapprenticeshi00will>.

Wilson, Donald A. *Interpreting land records*. (Hoboken, Wiley, 2006)

## Websites

- American Ancestors – [www.americanancestors.org](http://www.americanancestors.org)
- American Ancestors External Databases (at home) [www.americanancestors.org/Search/External-Databases](http://www.americanancestors.org/Search/External-Databases)
- Ancestry [www.ancestry.com](http://www.ancestry.com)
- ArchiveGrid <https://researchworks.oclc.org/archivegrid/>
- Bureau of Land Management <https://gloreCORDS.blm.gov/search/default.aspx>
- FamilySearch [www.familysearch.org](http://www.familysearch.org)
- Find My Past [www.findmypast.com](http://www.findmypast.com)
- Fold3 [www.fold3.com](http://www.fold3.com)
- GenealogyBank [www.genealogybank.com](http://www.genealogybank.com)
- National Archives [www.archives.gov](http://www.archives.gov)