



## Beginning Genealogy Research Outline

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### Introduction

This study guide introduces patrons to the field of genealogy. The Fort Myers Regional Library offers a number of excellent “how-to” books on the subject of genealogical research. These materials are shelved in both the adult and juvenile nonfiction areas under the call number 929.1. The library also has over 160 informational study guides on a variety of specific subjects pertaining to genealogical research. Patrons may obtain electronic copies by contacting Bryan L. Mulcahy at [bmulcahy@leegov.com](mailto:bmulcahy@leegov.com) or 239-533-4626.

There are a limited number of study guides available free in the library’s genealogy research room, which is in a separate part of the facility. This room is reserved solely for genealogists. No children or nongenealogists are allowed in the room to help facilitate a more conducive atmosphere for research.

Users are advised that these study guides are outlines. They will provide individuals with a basic overview of the subject matter. They *will not* provide the same in-depth coverage on the “why” behind any given issue or challenge in genealogical research. To understand the long-term meaning of the “why,” one must take the time to read “how-to” books on the subject of genealogical research.

*While the library has no copyright restrictions on any study guides, users are advised that copyright laws pertain to genealogists in the same manner as the general public.* This issue should be considered when making copies for anything beyond free personal use. Each study guide includes the following copyright statement. **Note:** These study guides are not meant to be substitutes for reading a cited article, periodical or a book written by a subject specialist in the field of genealogy. It is normal to occasionally encounter brick walls in genealogy. Taking the time to read suggested books or articles or attend lectures presented by a genealogy subject specialist is the best long-term investment for success.

Besides attending lectures and taking time to read how-to books and articles on genealogy, the beginning genealogist also is advised to:

- A. Join a local genealogical society. Southwest Florida has several excellent genealogical societies available for assistance and membership. Their names and websites are:
  1. Charlotte County Genealogical Society, <http://www.ccgsl.org>.
  2. Genealogical Society of Collier County, <http://thegscc.org/>.
  3. Genealogical Society of Sarasota County, Inc., <http://www.rootsweb.ancestry.com/~flgss/>.
  4. Lee County Genealogical Society, <http://www.lcgsfl.org/>.
  5. Manatee Genealogical Society, <http://www.rootsweb.ancestry.com/~flmgs/>.

6. Southwest Florida Germanic Genealogical Society, <http://swflgg.org/>.
- B. Most experts also advise joining a genealogical society in every locality or jurisdiction where the long-distance research is conducted. The Fort Myers Regional Library offers two titles that are useful in locating societies and agencies in other states:
1. ***Red Book: American State, County, and Town Sources*** (Provo, Utah: Ancestry, c2004, Genealogy Reference 929.1072 RED)
  2. ***Genealogist's Address Book*** by Elizabeth P. Bentley (Baltimore, Maryland: Genealogical Publishing Company, c2009, Genealogy Reference 929.102 BENTLEY)

People become involved in genealogy for a variety of reasons, which also tend to dictate search strategies applicable to their research. The most common reasons are:

1. Hobby.
2. Employment or professional needs.
3. Adoptee seeking information for medical or personal reasons.
4. Legal/medical reasons. (Gulf War veterans, smokers, etc.)
5. Admittance to a historical or genealogical society (lineage societies, e.g., Daughters of the American Revolution).
6. Death or pending death of a family member.

Regardless of the reason, the key to ultimate success is a person's ability to organize the research when beginning the process of collecting data. The two most important factors to consider are location and order:

1. Location – Wherever one decides to store notes and documents, be sure to choose a place that is easily accessible and remembered. If one plans on using one of the many software programs currently available, take the time to become familiar with the procedures for entering data and always back up all information with a flash drive or other storage option. *Do not discard any paper copies of documents or information.* Most genealogical societies have special interest groups that are specifically geared toward helping researchers become familiar with genealogy software programs.
2. Order – Decide on a filing method. The most common is alphabetical by surname, with folders or binders for each individual. Each folder may include documents such as family group sheets, pedigree charts, wills, photographs or various certificates. Some researchers use acid-free plastic protective sheets to hold and preserve their photographs and documents. The library's companion study guide, *How to Organize Your Genealogical Research*, is an excellent assistance tool in this process. A researcher's information is only as good as his or her ability to locate it in a timely manner. After progressing through the various steps, the importance of organizing information will become apparent.

## How Do I Begin?

### Step 1 – Ask oneself the following six questions before beginning a genealogical research:

1. What do I currently know about my ancestors?
  - a. This refers to the basic facts that most people know about parents, grandparents, family stories, traditions, etc.
  
2. What more would I like to learn about my ancestors?
  - a. Choose one of the following scenarios:
    1. Group 1 – Patrons looking for a specific ancestor or researching in a specific time period only (legal Cases or military benefits).
    2. Group 2 – Patrons simply conducting a basic search to get the gist or intriguing highlights of their background but have little interest in proof.
    3. Group 3 – Patrons wanting to go as far back in time as possible and proof is a major goal when possible.
  - b. Filling in gaps in time periods.
  - c. Learning the names of unidentified people when no identifying information is at hand.
  - d. Prove or disprove facts about family relationships, disputes, inheritance issues or acquisitions.
  
3. How can I go about finding the information?
  - a. This is when it's necessary to develop a research plan.
  - b. Develop a profile of places of residences, times and dates of residence, religious affiliations, occupations, etc.
  - c. Profiles can provide a road map of places and jurisdictions where records may be on file.
  - d. Read a history of the place or places of residence, ethnic groups, etc. These often provide valuable clues about family characteristics, affiliations, migration patterns, etc.
  
4. Is there anyone in the family who has kept old mementos from past generations and/or who knew some of the older family members or traditions?
  - a. Target the oldest family members and try to conduct an oral history interview. Record it electronically, if possible.

- b. Inquire about the existence of old documents, photo albums and memorabilia.
- 5. Are there any neighbors or distant relatives that could have information of interest?
  - a. Families were much closer in past generations.
  - b. Neighbors had more interaction with each other, especially the children.
- 6. What resources will help determine the accuracy of this information?
  - a. Ever read a history of the time period and place of residence?
  - b. What record types would have been generated based on the lifestyle and circumstances.
  - c. Imagine facing the same circumstances and living in that era. This is where taking the time to read a history on the specific location and time period is vital.

**Step 2 – Take the time to read a book about doing genealogy.** Going this route may delay researchers in the beginning, but usually pays off through multiple timesaving dividends in the long run. Self-help or how-to books describe the numerous sources of information available to researchers. Public record keeping was extremely unorganized or nonexistent in previous generations. How-to books often provide the following advantages:

- 1. Describe sources of information and record types available.
- 2. Provide tips on how to begin research.
- 3. Locating information in primary and secondary sources.
- 4. Provide suggestions for developing a research plan/search strategy.
- 5. Describe procedures for citing sources.
- 6. Help a researcher organize data.

**Step 3 – Join a local genealogical society and any societies located in areas where doing research for ancestors is anticipated.** Society membership can include opportunities for networking and information-sharing with other genealogists. Some societies provide their members with a variety of research-related services including beginners' classes. The four most important benefits of joining a local society in a primary place of residence and in those communities where conducting searches, are listed below:|

- 1. Membership offers opportunities for networking with other genealogists.
- 2. Experts highly recommend joining a society in any location where research is ongoing as well.
- 3. Some societies provide their members with a variety of research-related services, (especially long-distance research), which can become quite costly otherwise.
- 4. One is likely to find a lost relative doing research on the same line or a neighbor who knew the family, especially if joined a society in the area of a search.

**Step 4 – Tell the family about one's interest in beginning a search of the family history.** Don't make the mistake of springing the decision on family members out of the blue. Failure to explain one's intention may create tensions and give a false impression that the goal is to "stir up trouble" from the past. While some family members may be delighted to talk about the past,

others may take offense. Family tensions may seriously impede any chances for success. Taking the extra time to explain one's interest often pays off in the following long-term dividends:

1. Helps create the image of being polite and considerate of other people's feelings.
2. Helps in persuading people to cooperate.
3. Assists in determining who is willing to help.
4. Identifies candidates for oral history interviews in person or via correspondence, depending on the circumstances.

Inquire about family members and friends who have kept family artifacts such as:

1. Photo albums.
2. Family Bibles.
3. Diaries, yearbooks and old personal correspondence.
4. Check for the existence of miscellaneous documents such as ...
  - a. alien registration cards.
  - b. baptismal, birth, death or marriage certificates.
  - c. draft cards.
  - d. funeral/memorial cards.
  - e. naturalizations.
  - f. school certificates, report cards, etc.

**Step 5 – Compile a list of living relatives or neighbors who express an interest in assisting with the research.** Candidates on this list should be those who have some direct and accurate knowledge of individuals and/or major events in the family. Be sure to include their current phone numbers and addresses, including email addresses when applicable. The list should be prioritized in the following manner:

1. Based on the age and health of each individual.
2. Those in the poorest health and/or the most advanced age should be first.
3. Their initial responses to genealogical interest.
4. Those who have the reputation for telling the best and most accurate stories or who tend to recall the most about family traditions and events.

**Step 6 – Plan your questioning strategy.** This step usually involves the process of planning to interview the subject. For some researchers, this will involve preparing for an oral history interview. These interviews are designed to gather as much knowledge about the past, focusing on personalities and events that have impacted the life decisions of any ancestors. Some professionals refer to this as “putting meat on the bones” i.e., going beyond the compilation of dates, names and places. A researcher may want to know more details about the people as in who they were, why they acted in the manner they did and why they made the decisions which influenced their lives.

The two most common methods used by most genealogists are:

1. Long distance by correspondence and/or email.
2. Planning and conducting a formal oral history interview.

Regardless of which method is utilized, long-term success is determined by how much time and effort a researcher is willing to put into the planning process. Planning is essential for success. Most experts regard these steps as being the most critical in terms of putting oneself in the best possible position for success:

1. Taking the time to read a history of the locality or ethnic group while focusing on the time period relevant to the research.
2. While this may delay the research, the insights gained often shed light on events that had major impacts on life decisions made by ancestors.
3. Compile clear and concise questions. This is especially critical if a researcher seeks information by correspondence.
4. Ask open-ended questions. See examples in the next paragraph below.
5. If one chooses the correspondence route, be sure to enclose a stamped and self-addressed, business-size envelope. (Priority or express mailing may help expedite the request.)
6. If asking for a photograph or document, provide an adequate box or envelope so the item will not be damaged during transport.
7. Be prepared for the possibility of having to pick up the item(s) if the family member insists.

The key to obtaining the most information is asking open-ended questions. Questions should be worded in such a way to avoid simple “yes” or “no” answers. Examples include the following:

1. What’s your full name? (Always be sure to use maiden names for all females.)
2. When and in what city, state, country or province were you born?
3. What schools did you attend?
4. Where and with whom, specifically, did you grow up?
5. What were some of the major events that took place during your pre-adult years?
6. When and where were you married? (This may involve multiple marriages.)
7. Whom did you marry? (This may involve multiple spouses and step-children.)
8. What is his or her full name?
9. How many children did you have? (How many survived?) This may be a very delicate question, so tread lightly or do not ask.
10. What are their full names? Some ethnicities have more than one last name, especially females, and are used after they marry.
11. What were your parents’ full names?
12. When and where were your parents born?
13. Where, specifically, did your parents grow up?
14. When and where did your parents marry?
15. What memories do you have of your grandparents (in relation to these questions)?
16. Do you have any family diaries, family Bibles or photographs?
17. Where and what church did the family attend?
18. What denomination were they?
19. Which cemetery (ies) is/are your ancestors buried/cremated?

Names and dates are important because they help researchers identify and organize ancestors by name and lineage. Learning about their personalities makes the names come alive. Hopefully, a

researcher will learn who each ancestor actually was, what he or she had to overcome in his or her lifetime, and how their lives would later shape one's own persona today.

Many researchers will ask these questions in an interview-type setting. If the person is comfortable, record the information in audio or DVD format. If it is necessary to write the information down, be sure to have the names and dates right. Be sure to write the notes so they are legible, in case one needs to refer to them. If a question arises later, check back with the person. If nicknames are encountered, find out the full name. Be careful about spelling. The same applies for place names. If pictures are found, take them to the interview and fully document the content (preferably in pencil, not ink, on the back of the picture if space allows).

**Step 7 - Investigate home sources.** Many genealogists initially make the mistake of ignoring the possible existence of some very valuable genealogical records located in the homes of family members, friends and neighbors. Taking the time to look for these sources may save significant amounts of time and money. This is especially true since a growing number of governmental agencies are restricting access to public records. It is important to remember the following points:

1. Most ancestors were issued copies of certificates such as a followed.
  - a. Certificates of birth, marriage, death and naturalization.
  - b. Certificates of baptism, confirmation, first communion and marriage.
  - c. Draft cards and/or military discharge papers.
  - d. Awards issued by employers, civil groups, churches, etc.
  - e. School diplomas, school photos, yearbooks and report cards.
2. Other important examples of items containing genealogical information that may be found at home include:
  - a. Family Bibles.
  - b. Old letters.
  - c. Journals or diaries.
  - d. Photographs.
  - e. Photo albums.
  - f. Newspaper clippings.
  - g. Wills.

**Step 8 - Recording Information.** Organization is critical when compiling the information taken from interviewing family members and from examining home sources. Two of the most popular formats in the organization of family data involve the use of pedigree charts, family group sheets and individual data sheets. The library's companion study guide, *How to Organize Your Genealogical Research*, will make this process much easier and less confusing later.

- A. Pedigree charts – These charts give the broadest outline of a family tree. As one reads from left to right, these forms show the name of a person, usually beginning with oneself, and then branching out to show parents. Each of these lines branch out in turn for grandparents, great-grandparents and earlier generations. Since these charts can stretch

for several generations, a standard form will usually show only four or five generations of a family line with reference to other pedigree charts that continue backward in time.

- B. Family group sheets – Whereas pedigree charts show the outline of a family, family group sheets show the full family structure. This form records the names of the father and mother at the top, then the names of all children. Space is also included for all, birth, marriage, death dates and places, names of spouse(s) of each child, residences, religious affiliation, etc. A researcher will need a single-family group record for every couple (husband and wife) in one’s genealogy. If someone married more than once, one will need a separate family group record for each marriage, including any children from that marriage.
  
- C. Individual data sheets – Even though a family group sheet contains more information than a pedigree chart, it still doesn’t have enough room to record everything that one needs to know about an ancestor. This is where the individual data sheet comes in. This sheet is a summary of the events in the life of an ancestor. In addition to the vital records basics (birth, marriage and death), list any other major events such as:
  - 1. Schools attended.
  - 2. Military service (sometimes shows locations).
  - 3. Religious affiliation and churches attended.
  - 4. Places of residence.
  - 5. Appearances in census schedules.
  - 6. Property and land transactions.
  - 7. Immigration.
  - 8. Society memberships.
  - 9. Employment history
  - 10. Nicknames.
  - 11. Alternate spellings of names.

As one begins to record information on these sheets, fill in as many blanks as possible. It is not necessary to fill in all of them at the same time, especially if the data was provided verbally. Only fill in the information when it is received. If there are spaces that will never be relevant, be sure to say “not applicable or N/A” in the space or column provided. This will ensure that the researcher or someone else will not accidentally think that something was missed and waste valuable research time. Important points to follow include:

- 1. Use pencil for preliminary work.
- 2. If one does not have exact dates, pencil in approximate dates. (Example 12 July 2007).
- 3. Always spell out the entire month (March, not Mar.).
- 4. If one must write, make sure that the writing is legible and use BLOCK LETTERS.
- 5. Record entries should be neatly printed, typed or entered in a genealogy software program. If absolutely necessary, temporarily type information into a computer spreadsheet, such as Microsoft Excel.
- 6. Write surnames in ALL CAPITAL LETTERS.
- 7. Use full names of parents, children and relatives (DO: JONES, Ira M. DON’T: I.M. JONES).



8. Use maiden names for female ancestors, even if they were married more than once.
9. Underline any unusual spellings of names to denote that records were copied correctly.
10. When the gender of an ancestor is different from the normal usage of the name, underline the gender and name to show that both are correct.
11. Cite the sources for all information. Further research may cast doubt on the validity, but there is usually a grain of truth in every story. These grains may give clues for additional research.
12. Use separate sheets to record family tales, legends and myths.

**Step 9 - Using libraries, archives and repositories.** All libraries, archives and repositories, regardless of their size or location, have unique aspects to their collections or facilities. Most have websites that offer patrons the opportunity to search their holdings and plan research trips in advance of their visit. This is particularly useful for genealogical researchers. Most facilities with genealogical collections will usually have some or all of the following items:

1. Printed bibliographical holdings from library collections and the National Archives.
2. Lineage books.
3. Self-help/how-to books.
4. Directories for courthouses, family associations and government agencies.
5. Printed family histories.
6. Family history surname files.
7. Indexes to local, state or federal records.
8. Local/regional newspapers.
9. Databases such as Family Search, Heritage Quest and/or Ancestry Library Edition.
10. Census microfilm.
11. Land records.

Generally a researcher can expect libraries, archives and nonfederal or state repositories to have mostly secondary sources. One may begin to encounter discrepancies between what family members share and what printed records describe. For now, simply record the information as found. As the research progresses, one will learn how to analyze evidence to determine which facts are the most accurate.

When visiting or corresponding with any type of research facility, be sure to inquire about the availability of a brochure or information sheet that describes the organization of the genealogy collection and what services are available to researchers and when. Some librarians and research assistants are only available for genealogy assistance at certain times and days of the week. They may also have to locate the information before one arrives, so be sure to advise them about the specific information sought. If actually visiting the facility, ask for a guided tour of the collection. Most libraries with medium or large collections will offer this type of service.

The Family History Library in Salt Lake City conducts tours of the library every 15 minutes and includes a supplemental 15-minute video presentation. The FamilySearch website, <http://www.familysearch.org>, offers a number of tutorials describing collections held by the Family History Library in Salt Lake City and other related aspects to prepare for research trips to any repository. The Fort Myers Regional Library is a registered library affiliate of the Family

History library in Salt Lake City. This agreement allows patrons to borrow microfilm and microfiche holdings, just like they would at a Family History Center, and have them sent to the Fort Myers Regional Library for viewing. The library is the only affiliate or Family History Center serving Lee and Collier counties. To initiate the borrowing process, patrons must register <https://familysearch.org/films/>, which discusses the guidelines and fees.

When utilizing library resources, be sure to maintain a research log. Research logs enable genealogists to keep track of sources, regardless of where they perform research and/or whether it is done in person, by mail, fax or internet. Research logs should include the following information:

1. Date of search.
2. Name, address, telephone number, city and state of the institution where source was found.
3. Website URL, if applicable.
4. Name and title of staff member who provided assistance and their hours.
5. Author of book or periodical.
6. Title of book, microfilm name and roll number, microform or periodical.
7. Library book or article call number or periodical identification number. Include full citation and copyright date.
8. Exact page number and volume number, if applicable.
9. Results of information obtained.

If it is necessary to do research via mail, internet, telephone or fax, be sure to maintain a correspondence log (in addition to a research log). To ensure maximum success of one's research and avoid duplication of efforts, include the following information in the correspondence log:

1. Name of the institution contacted.
2. Date and time of telephone call(s) and telephone number, fax number, website address or date when letter was mailed.
3. Brief description of information requested.
4. Copy of request for future reference, in case the institution has questions or needs additional information.
5. Format and date of reply.
6. Full name and title of individual(s) who answered letter, fax, email or telephone call.
7. Note whether the reply fully answered the question or provided other relevant options.
8. Reference to any follow-up when and where relevant.
9. Ask if collections are updated and, if so, how often. This includes websites.

**Note:** Keeping a log of where a record was searched avoids duplicating searches and provides a timeframe in which to check for any updates to any collections or websites. Hint: Adding websites to the browser favorites bar or folder will make it easier to track websites.

**Step 10 - Utilization of public and private records.** Once reaching this stage, a researcher will be contacting public institutions on the city, county, state and federal levels. Most public records will be found at courthouses or state vital records archives. These types of records are usually considered primary sources. Primary records were generally created at the actual time the event occurred, or in close proximity to when the event occurred. A family member or person with direct knowledge of the event supplied the information.

One may also wish to contact various private institutions such as churches, professional associations or organizations. Most researchers at this stage attempt to obtain copies of death and birth certificates and marriage licenses. This step will involve fees because all state offices and county courthouses normally charge for copying and research services. It is important to know the approximate date and the exact county and state where the event occurred. These records may provide information about the person and often about their parents. A stamped and self-addressed return envelope is always appreciated, and usually required, but may also ensure a better chance of getting the information.

It is just as important to maintain research and correspondence logs at this stage of one's research as before. These logs should be an ongoing part of one's research.

**Note:** Privacy policies vary when it comes to these types of facilities. Records may not be made available to the public, or one may need certain forms and/or identification to obtain the information. Be sure to ask before making any requests or visits.

### **Most Popular Types of Public Genealogical Records**

#### **I. Vital Statistics**

- A. Birth Records – Generally contains the name of the child, the exact date and place of birth and names of both parents. When tracing ancestors, the place of birth is often more important than the exact date the child was born. Birth records also may indicate the number of children living or no longer living.
- B. Marriage records – These may provide the name of both bride and groom, where they were both born, their ages, name of the father or parents of the bride and groom, the exact place where marriage occurred and where the bride and the groom resided before their marriage. Some also include the occupations of both sets of parents and of the engaged couple. They may state names of witnesses, the person who officiated during the ceremony and when and where the certificate was issued.
- C. Death records – These usually contain the marital status, cause of death and the age of the deceased. They often identify the place of burial, church or funeral home, and in some cases, provide the decedent's place of birth. They may also include names of witnesses, their relationship to the decedent and the physician's name. If death records are not available for a particular place, cemetery records are a good substitute. Headstones can offer wonderful clues to researchers, with statements like "native of County Cork, Ireland." Some local genealogical and historical societies have inventoried the cemeteries and transcribed the tombstone inscriptions in printed format and/or online.

**Note:** Laws vary by region, so be sure to state specifically what is being sought. Mentioning “genealogy” in a request may determine how much information and what type of documentation one receives, versus other reasons, even if one is a direct relative.

## II. Census Records

Although vital statistics are very important to genealogical research, census records can provide researchers with far more information. Every 10 years, beginning in 1841 in England and Scotland, 1851 in Canada and 1850 in the United States, a concerted effort was made to count every man, woman and child by name, age, birthplace, occupation and residence. In the United States, the first federal census was taken in 1790. However, only the heads of the household were listed by name. All other occupants were designated by check marks or numbers within specified age categories.

Enumerators recorded the census information. All entries were handwritten on large ledger sheets. The accuracy of census data can be excellent in some areas, but horrendous in others. This could be explained by a variety of factors:

1. Handwriting.
2. Education level of the census taker.
3. Attitudes of the local population toward the census and census taker. For example, in the South after the Civil War, census takers often had to go into areas escorted by soldiers for their own safety. People were not forthcoming in that type of situation.
4. Knowledge of family members. For example, many men insisted on answering the questions since the house was their castle, so to speak. Men are usually the worst sources for accurate information pertaining to dates.
5. Knowledge of the neighbors. Even if it violated the rules that census takers were supposed to be following, if a family was not at their residence at the time the census taker was present, instead of returning later, the census taker would often collect the information from a neighbor.
6. Dialect of the person providing the information and the ability of the census taker to understand it and record it correctly.

To effectively use census data, it is important to know where one’s ancestor was living during the census year (i.e. city, town, village or parish) and the county and state. If the exact place or census year is unknown, try using various indexes covering census data or vital statistics (births and marriage records).

## III. Land Records

- A. Deeds (warranty deeds) – The most important type of land record. The deed is a document by which title to real property is conveyed from one party to another (grantor to grantee).

- B. Mortgage – The mortgage is a document by which a person/company pledges real property, or a portion thereof, as security for the payment of a debt.
- C. Lease – The lease is a contract by which a property owner (lessee/lessor) agrees to rent possession of property to another person for a stated period in return for some type of consideration, usually financial in nature.
- D. Bill of sale – This document, similar to a deed, was used to convey title to major items of personal property. Historically, this included slaves and livestock. In some cases, this is also known as a bill of lading.
- E. Plats – Official drawings of boundaries of a tract of land.
- F. Liens/judgments – An attachment to real or personal property to secure payment (lien holder).

### **Finding Local Area Land Records**

- A. Original records – An officer, who goes by various names such as property appraiser, county recorder, recorder of deeds, clerk of court, register of deeds or county clerk, usually keeps local land records at the county level.
- B. Indexes – Indexes are essential tools in the use of land records. Deed indexes include only the legal description of the land and names of the grantor and grantee. No other person(s) who hold an interest in the property may be mentioned in the document.
- C. Published abstracts and indexes – Deed abstracts and indexes have been published in a variety of formats.
- D. Tax records – Tax records are tools to assist in locating ancestors in a particular place at a given time before census records were available and between decades when federal population censuses occurred.

#### **IV. Probate Records**

The probate file (or estate packet) can be one of the most useful sets of records for any genealogist. This file can be extremely useful in establishing relationships within a family and tracking down lost or unknown ancestors. Probate files may include some or all of the following information:

1. Last wills/testaments/trusts/codicils (amendment to a will).
2. Petitions for probate or applications of letters of administration.
3. Copy (ies) of death certificate(s) for the decedent or spouse, if no longer living, and death certificates for any heirs.
4. Notice of a probate filing in another jurisdiction if property is owned out of area (usually real property).
5. Letters testamentary or letters of administration.
6. Executor's or administrator's bonds.
7. Contested wills. (In some cases, a civil suit may be filed along with the probate case.)

8. Appointments of guardians. (This may be of person and/or property and for a minor child. Those records are sometimes sealed.)
9. Waivers by beneficiaries and their addresses.
10. Inventories. (This may include a safety deposit box.)
11. Sale bills.
12. Assignments of dower.
13. Waivers by beneficiaries and their addresses.
14. Accounts and final settlements.

**Note:** Statutory laws have changed the public viewing of some documents. Check with the clerk of court on procedure and availability of records.

For additional information on probate records and genealogical research, see the library's companion study guide, *Probate Records: Their Purpose & Value to Genealogists*.

## Suggested Readings

***101 Brick Wall Busters: Solutions to Overcome Your Genealogical Challenges*** (Cincinnati, Ohio: Family Tree Books, c2010, Genealogy Reference 929.1 101)

***A Student's Guide to African American Genealogy*** by Anne E. Johnson (Phoenix, Arizona: Orxy Press, c1996, African-American Collection at Dunbar Jupiter Hammon Public Library, 929.1 JOHNSON)

***A Student's Guide to British American Genealogy*** by Anne E. Johnson (Phoenix, Arizona: Orxy, c1996, Adult Non-Fiction 929.1 JOHNSON)

***A Student's Guide to Chinese American Genealogy*** by Colleen She (Phoenix, Arizona: Orxy Press, c1996, Adult Non-Fiction 929.1 SHE)

***A Student's Guide to German American Genealogy*** by Gregory Robl (Phoenix, Arizona: Orxy Press, c1996, Adult Non-Fiction 929.1 ROBL)

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