



**Beginning Genealogy Research
Fort Myers Regional Library
Genealogy Room 2nd Floor
December 2025**

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 non-fiction areas under the call number 929.1. We also have over 200 informational study guides on a variety of specific subjects pertaining to genealogical research. Patrons may obtain electronic copies by contacting Bryan L. Mulcahy via e-mail at bmulcahy@leegov.com or via telephone at (239) 533-4626.

The genealogy room is available for patron access during all hours of library operation: **Monday-Wednesday, 9am – 8pm; Thursday 9am-6pm; Friday and Saturday 9am-5pm.** No appointments are necessary for patrons that are experienced with using the collection and will not need assistance beyond minor directional information. Patrons seeking research assistance are invited to contact Bryan L. Mulcahy. Research assistance is free. Mr. Mulcahy can be reached by telephone at 239-533-4626 or via email at bmulcahy@leegov.com.

Appointment requests are limited to the following day and times: Tuesdays from 10-12 and Wednesdays from 1-3. If these hours do not work with your schedule, you are welcome to submit other days of the week and times. Mr. Mulcahy will be in touch with you concerning possible options.

Seating in the room is limited. If you wish to bring your spouse, that is permitted if space allows unless you are both doing genealogy. This room is reserved solely for genealogists. In order to facilitate a more conducive atmosphere for research, no children or non-genealogists are permitted in the room.

If you wish to come to the branch to use the databases, especially the enhanced version of FamilySearch, you may access the genealogy databases from any computer in the building. Internet access to genealogy databases is not limited to just the genealogy room. Please note that our genealogy databases are available on our library homepage link at <https://www.leegov.com/library/adults>.

If you have the names of **specific** titles of books in the collection and you wish to come to the branch and use them, please contact Bryan L. Mulcahy at bmulcahy@leegov.com in advance of your visit. Mr. Mulcahy will arrange to pull the items and have them waiting for you either in the genealogy room or at the 2nd floor reference desk. A complete listing of our holdings is available on the Lee County Genealogical Society website at <https://lcsfsl.org/fort-myers-regional-library-genealogy-department-shelf-list/>. This is a searchable database of titles that can be searched by location and subject and was compiled by the past president of the Lee County Genealogical Society, Carol Rooksby Weidlich.

A limited number of study guides are available free in the Genealogy Room. Users are advised that the 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 genealogical research topics as would be available in “how-to” books on the subject of genealogical research.

While we have no copyright restrictions on any materials as such, users are advised that copyright laws pertain to genealogists in the same manner as the public. This issue should be considered when making copies for anything beyond free personal use. Each study guide has the following copyright statement at the bottom. **NOTE: This study guide is meant to serve as an overview or outline for patrons using the genealogy collection at Fort Myers Regional Library. The compiler emphasizes that the information contained in this study guide should not serve as a substitute for taking the time to read one of the books or articles cited in the bibliography, or attend lectures given by the subject specialists cited as authors.**

The beginning genealogist is advised to:

1. Take time to read a “how-to” book written by a subject specialist in the field of genealogy.
2. Attend lectures or read books, articles, etc. provided by subject specialists listed in each bibliography.
3. Join a local genealogical society. Southwest Florida is fortunate to have several excellent genealogical societies available for assistance and membership. The names of the societies and websites are listed below:
 - a. Bonita Springs Genealogy Club <https://fsgs.org/directory/bonita-springs-genealogy-club/>
 - b. Charlotte County Genealogical Society: <https://ccgsi.org/>
 - c. Genealogical Society of Collier County: <https://thegscc.org/>
 - d. Genealogical Society of Sarasota County: <http://sites.rootsweb.com/~flgss/>
 - e. Lee County Genealogical Society: <http://www.lcsfsl.org/>
 - f. Manatee Genealogical Society: <https://mgsfl.org/>
 - g. Southwest Florida Germanic Genealogical Society NOTE: The society has disbanded but is a special interest group within the Charlotte County Genealogy Society. Please visit their link <https://ccgsi.org/> for more information on this topic.
4. Most experts also advise joining a genealogical society in every locality or jurisdiction where you are conducting long-distance research.

People become involved in genealogy for a variety of reasons. The reasons, which influence your decision to begin the process, will also dictate search strategies applicable to your 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 (Military veterans, smokers, etc.)
5. Admittance to a historical or lineage society (e.g., DAR, SAR, Mayflower, etc.)
6. Death or pending death of a family member

Regardless of the reason, the key to ultimate success is your ability to organize your research as you begin the process of collecting data. The two most important factors to consider are LOCATION and ORDER:

1. **Location:** Wherever you decide to store your notes and documents, be sure to choose a place that is easily accessible. Another option is investigating genealogical software programs that allow users to input their research information and the program automatically organizes the data. The following links will provide information on this topic.

American Ancestors – New England Historical Genealogical Society – Choosing a Genealogical Software Program

<https://www.americanancestors.org/education/learning-resources/read/genealogical-software-programs>

FamilySearch Wiki – Windows Genealogy Software

https://www.familysearch.org/wiki/en/Windows_Genealogy_Software

Family Tree Magazine – Online Tree or Genealogy Software: Deciding Where to Keep Your Data

<https://www.familytreemagazine.com/resources/online/online-tree-vs-genealogy-software/>

Even if you choose this route, it is wise to maintain a paper backup of all information and documents. If you plan to use one of the many software programs currently available, be sure you take the time to become familiar with the procedures for entering data and always back up your 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 specifically geared toward helping researchers become more familiar with genealogy software programs.

2. **Order:** Decide what your method of filing will be. The most common is alphabetical by surname, with folders or binders for each family. You will want to include documents such as family group sheets, pedigree charts, wills, photographs, or various certificates. Some researchers use **acid-free** plastic sheet protectors to hold and preserve their photographs and documents. Our companion study guide on ***How to Organize Your Genealogical Research*** is an excellent tool to assist you in this process.

Your information is only as good as your ability to locate it in a timely manner. As you progress

through the various steps, the importance of organizing information will become apparent. I have compiled multiple free study guides on this topic which can be sent electronically and are free upon request.

How Do I Begin?

Step One: Six questions you should ask before beginning your genealogical research experience.

1. What do I currently know about my ancestors? 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? Choose one of the following scenarios:
 - a. Group #1: Patrons looking for a specific ancestor or researching in a specific time period only. (Legal cases or military benefits)
 - b. Group #2: Patrons simply conducting a basic search to get the gist or intriguing highlights of their background. They have little interest in proof.
 - c. Group #3: Patrons want to go as far back in time as possible and proof is the optimum goal.
 - (1) Filling in gaps in time periods.
 - (2) Learning names of people you have heard about but have no names or other identifying information.
 - (3) Proving or disproving facts about family relationships, disputes, inheritance issues or acquisitions.
3. How can I go about finding the information?
 - a. Develop a research plan.
 - b. Develop a profile 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 who may have information of interest?
 - a. Families were much closer in past generations.
 - b. Neighbors had more interaction with each other, especially the kids.
6. What resources will help determine the accuracy of this information?
 - a. Have you read a history of the time period and place of residence?
 - b. Ask yourself the following question. What record types would have been generated based on the lifestyle and circumstances?
 - c. What you would have done if you faced the same circumstances and lived in that era.
NOTE: This is where taking the time to read a history of the specific location and time period becomes vital!

Step 2 - Read a book about doing genealogy.

Going this route may delay you 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 non-existent 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 your research.
3. Help you locate information in primary and secondary sources.
4. Provide suggestions for developing a research plan/search strategy.
5. Describe procedures for citing sources.
6. Help you organize your data.

Step 3 - Join a local genealogical society and any societies located in areas where you anticipate researching ancestors.

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 your ancestors' primary place of residence, as well as those communities where you are searching, 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. You often find a lost relative doing research on the same line or a neighbor who knew the family especially if you join a society in the area of your search!

Step 4 - Tell your family that you are interested in beginning a search of your family history.

Do not make the mistake of springing your decision on family members unexpectedly. Failure to explain your intention may result in creating tensions and the impression that you are trying 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 your chances for success.

Taking the extra time to explain your 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 you in determining who is willing to help you.
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. Birth/Death Certificates
 - b. Marriage Certificates
 - c. Draft Cards
 - d. Naturalizations
 - e. Alien Registration Cards
 - f. School Certificates, Report Cards, etc.
 - g. Baptismal Certificates
 - h. Funeral/Memorial Cards

Step 5 - Compile a list of your living relatives or neighbors who express an interest in assisting you, including their phone numbers and addresses.

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. Prioritize the list 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 your interest.
4. Those who have the reputation for telling the best, and most accurate, stories or 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 influenced the life decisions of our ancestors. Some professionals refer to this as “putting meat on the bones” i.e., going beyond the compilation of dates, names, and places. You 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 that influenced their lives. The two most common methods used by most genealogists are:

1. Long distance by correspondence and/or e-mail.
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 you are willing to put forth into the planning process. Planning is essential for success. Most experts regard these steps as being the most critical in terms of putting yourself 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 your research.
2. While this may delay your research, the insights gained often shed light on events that had major impacts on life decisions made by our ancestors.
3. Compile clear and concise questions. This is especially critical if you seek information by correspondence.
4. Ask open-ended questions. See examples below.
5. If you choose the correspondence route, be sure to enclose a stamped, self-

addressed business size envelope. (Priority or express mailing may help expedite the request.)

6. If you ask 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 as to avoid simple “yes” or “no” answers. Examples include the following:

1. What is your full name? (Always be sure to use maiden names for ALL females).
2. When, 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? (there may have been multiple marriages)
7. Whom did you marry? (may be dealing with multiple spouses and step-children)
8. What is his or her full name?
9. How many children did you have? (How many survived?) 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 did your ancestral family use?

Names and dates are important because they help you identify and organize your ancestors by name and lineage. Learning about their personalities makes the names come alive. Hopefully, you will learn who each ancestor actually was, what he or she had to overcome in his or her lifetime, and how his or her lives would later shape you as you are today.

Many researchers ask these questions in an “interview” type setting. If the person is comfortable, record the information in electronic format. If you must write the information down, be sure you have the names and dates right. Be sure to write the notes so they are legible in case you need to refer to them. If you have a question, check back with the person. If you encounter nicknames, find out the full name. Be careful about spelling. The same applies for place names. If you find pictures, 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. Your ancestors were issued copies of certificates such as those listed below:
 - a. Certificates of birth, marriage, death, and naturalization.
 - b. Certificates of baptism, confirmation, and first communion.
 - c. Draft cards and/or military discharge papers.
 - d. Awards issued by employers, civic 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 (online or manually).

Organization is critical as you compile the information taken from interviewing family members and from examination of home sources. Three of the most popular formats in organization of family data involve the use of pedigree charts, family group sheets, and individual data sheets. Our companion study guide on **How to Organize Your Genealogical Research** will make this process much easier and less confusing. There are a number of genealogy software programs that can also be used. The biggest advantage to these is the fact that you will always control how the information is collected and disseminated. If you use the free tools available on websites such as Ancestry, FamilySearch, Findmypast, etc., be sure to read the terms and conditions first. Be aware that potential copyright restrictions may influence your ability to publish data in the future. Another issue involves other researchers changing information that may or may not be accurate. Mr. Mulcahy has information he can send you electronically on this matter by contacting him at bmulcahy@leegov.com

Pedigree Charts: These charts give the broadest outline of a family tree. As you read from left to right, these forms show the name of a person, usually beginning with you, 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.

Family Group Sheets: Whereas pedigree charts show the outline of a family, family group sheets show the structure of one family group. This form records the names of the father and mother at the top, then the names of all children in order of birth. Space is also included for all birth, marriage, death dates and places, names of spouse(s) of each child, residences, etc. You will need a single family group sheet for every couple (husband and wife) in your genealogy. If someone married more than once, you would need a separate family group sheet for each marriage, including any children from that marriage.

Individual Data Sheets: Even though a family group sheet contains more information than a pedigree chart, it still does not have enough room to record everything you might 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 you begin recording information on these sheets, fill in as many blanks as possible. Do not be discouraged if you cannot fill in all of the information at the same time, especially if the data was provided verbally. Only fill in the information as you get it. If there are spaces that you know will never be relevant, be sure to say NOT APPLICABLE (N/A) in the space or column provided. This will ensure that you or someone after you will not accidentally think that something was missed and waste valuable research time. If you purchase a genealogy software program or use the free tools on sites such as Ancestry and FamilySearch, the program or website will sort the information for you. If you compile this information by hand, here are some important points to follow:

1. Use pencil for preliminary work.
2. If you do not have exact dates, pencil in approximate dates. (Example 12 July 2007).
3. Always spell out the entire month. (March, not Mar.)
4. If you must write, make sure your writing is legible and use BLOCK LETTERS.
5. Record entries should be neatly printed, typed or entered in a genealogy software program. If necessary, temporarily type information into a computer spreadsheet, such as 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 you copied the records correctly.
10. When the gender of an ancestor is different from the normal usage of the name, underline the gender and name to show both are correct.
11. Cite your 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 you 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. The link for the Fort Myers Regional Library genealogy homepage is <https://www.leegov.com/library/adults/genealogy>. Most facilities with genealogical collections 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 FamilySearch, HeritageQuest, and/or Ancestry Library Edition.
10. Census microfilm.
11. Land records.

Generally, you can expect libraries, archives, and non-federal or state repositories to have mostly secondary sources. You may begin to encounter discrepancies between what family members tell you and what printed records describe. For now, simply record the information as you find it. As you progress in your research, you 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 you arrive, so be sure to advise them as to what, specifically, you are seeking. If you are actually visiting the facility, inquire about a guided tour of the collection. Most libraries with medium or large collections offer this type of service.

The FamilySearch Library has the largest collection of genealogical materials in the world. They

have greatly expanded their research services both online and by visiting the library in person. For more information on this topic, please visit the following link <https://www.familysearch.org/en/library/visit>. This link will provide detail information concerning the following topics:

1. Research collections
2. Library services
3. Learning tools and resources
4. Planning a visit. This section will also discuss the new features implemented since the 2019-2021 closure and renovations took place.
5. Research services including the new online consultations with subject specialists.

The Family Search 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. Fort Myers Regional Library serves as a Family Search Library Affiliate. This status enables us to offer patrons access to more digitized non-copyrighted and non-restricted access films than what is available on regular FamilySearch. This enhanced access is only available at the Fort Myers Regional Library. Patrons must login to Family Search through our genealogy homepage link at <https://www.leegov.com/library/adults/genealogy>. Enhanced access is not available from home, any other branch, or by using the www.familysearch.org website login. Copyright-restricted films must be viewed at designated Family Search Centers. To locate the nearest one to your place of residence, please visit the following link: <https://www.familysearch.org/centers/locations/>.

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 your 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 assisted you, 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 you must do your research via mail, internet, telephone, or fax, be sure to maintain a correspondence log (in addition to a research log). To ensure maximum success in your research and avoid duplication of efforts, your correspondence log should include the following

information:

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 so you can refer to it in case 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, e-mail, 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 allows you a time frame in which to check for any updates to any collections or websites.

Hint: Adding websites to your favorites bar or folder will make it easier to track your websites.

Step 10 - Utilization of public and private records.

Once you reach this stage, you will be contacting public institutions on city, county, state, and federal levels. Most public records are found at courthouses or state vital records archives. These types of records are usually considered primary sources. Note that many of these historical records are now available online through databases such as Ancestry, FamilySearch, HeritageQuest, etc. Primary records were 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.

You 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. You must know the approximate date and the exact county and state where the event occurred. These records may give you information about the person and often about their parents. A stamped, 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 your research as before. These logs should be an ongoing part of your research.

NOTE: Privacy policies vary when it comes to these types of facilities. Records may not be made available to the public, or you 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

Section One: Vital Statistics

Birth Records: Birth records generally contain the name of the child, the exact date and place of birth, and names of both parents. When tracing your 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.

Marriage Records: Marriage records generally 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.

Death Records: Death records 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 you are looking for. Mentioning "genealogy" in a request may determine how much information and what type of documentation you receive, versus other reasons, even if you are a direct relative. Based on feedback I have received from a multitude of professional sources, it is better to come up with a reason that does NOT identify genealogy as the reason for your request.

Section Two: Census Records

Although vital statistics are very important to genealogical research, census records can provide researchers with far more information. Every ten 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. This procedure was in place from 1790 through the 1840 census. This is why most people concentrate on the censuses from 1850-forward.

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 was often a challenge to understand.
2. Education level of the census takers varied dramatically.
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. Do you think the people were 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, you must know where your ancestor was living during the census year (i.e. city, town, village, and parish) and the county and state. If you do not know the exact place or which census year, try using various indexes covering census data or vital statistics (birth and marriage records).

Section Three: Land Records

Deeds (Warranty Deeds): This is 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).

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.

Lease: The lease is a contract by which a property owner agrees to rent possession of property to another person for a stated period in return for some type of consideration (usually financial in nature). (Lessee/Lessor).

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**.

Plats: Plats are official drawings of boundaries of a tract of land.

Liens/Judgments: An attachment to real or personal property to secure payment. (Lienholder).

Finding Local Area Land Records

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.

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.

Published Abstracts & Indexes: Deed abstracts and indexes have been published in a variety of formats.

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.

Section Four: 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. Appointment 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. Bills of sale.
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 our companion study guide on ***Probate Records: Their Purpose & Value to Genealogists***

Short List of Suggested Internet Sources

Ancestry Support – Ancestry Learning Center – ***Tips for Beginning Family History Research***
<https://support.ancestry.com/s/article/Tips-for-Beginning-Family-History-Research>

FamilySearch Wiki – ***New to Genealogy – Beginners First Step***
[https://www.familysearch.org/wiki/en/New to Genealogy - Beginners First Step](https://www.familysearch.org/wiki/en/New_to_Genealogy_-_Beginners_First_Step)

National Archives – ***Resources for Genealogists – Start Your Genealogy Research***
<https://www.archives.gov/research/genealogy/start-research>
<https://www.archives.gov/research/genealogy>

National Genealogical Society – ***Nine Tips to Start Your Family History***
<https://www.ngsgenealogy.org/free-resources/tips-family-history/>

Crow, Amy Johnson. ***Beginning Genealogy: How to Get Started the Right Way***
<https://www.familysearch.org/blog/en/beginning-genealogy-started/>

Lathers, Ann. ***American Ancestors – Brue Family Learning Center – Getting Started: Tips to Help You on Your Way.***
<https://www.americanancestors.org/education/learning-resources/read/getting-started>

Lisson, Lisa – ***Genealogy for Beginners- Start Finding Your Ancestors***
<https://lialisson.com/genealogy-for-beginners/>

McDermott, Marc. ***Genealogy for Beginners – The Ultimate Beginners Guide to Genealogy***
<https://www.smarterhobby.com/genealogy/>

Morton, Sunny Jane. ***25 Best Genealogy Websites for Beginners***
<https://www.familytreemagazine.com/websites/25-best-genealogy-websites-for-beginners/>

Wieland, Vanessa. ***4 Research Tips for Beginning Genealogists***
<https://www.familytreemagazine.com/research-methods/beginner-genealogy-4-tips-4-starting-family-tree/>

You Tube Recordings

Cowan, Christa. Ancestry.com – **Genealogy 101: Back to Basics.** 2014 30 minutes

<https://www.youtube.com/watch?v=Ct2bq6M7fNk>

Knox, Constance. **Learn Genealogy Research (How to Research Your Family Tree) (Series).**

2018 15 minutes <https://www.youtube.com/watch?v=d5vH0ReMndY>

----- **Family Search.Org; 5 Tips for Free Genealogy Research.** 2024 30 minutes

https://www.youtube.com/watch?v=yN_ss-zaRvk

Lee, Devon Noel. Family History Fanatics. **A Beginner's Guide to Getting Started in Genealogy - Beginning Genealogy Tips.** 2021 31 minutes

<https://www.youtube.com/watch?v=Q8hiWs7VYcl>

----- Family History Fanatics. **Beginning Genealogy: Search These Five Records First to Build Your Family Tree.** 2021 14 minutes

<https://www.youtube.com/watch?v=CBVzswpTSFs>

----- Family History Fanatics. **How to Use Family Search.Org: Hints to Easily Do Genealogy – Beginners Basics.** 2021 30 minutes

<https://www.youtube.com/watch?v=3VyMKkJEWRU>

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American Records and Research: Focusing on Families-Course Two. Salt Lake City, UT: Salt Lake Institute of Genealogy. Coordinator-Paula Stuart Warren. Contributors- Chuck Knuthson, Marianne Crump, Thomas McGill, Anne Wuehler, Anne Roach, Ruth Maness, John Phillip Colletta, Kory Meyerink, Judith W. Hansen, and Birdie Monk Holsclaw, c2008. **Genealogy (G) 929.1 SALT**

Family Tree Guide Book: Everything You Need to Know to Trace Your Genealogy Across North America. Cincinnati, OH: Betterway Books, c2002. **Genealogy (G) 929.1 FAM**

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Coordinator-Patricia Law Hatcher. Contributors-Lloyd de Witt Bockstruck, Michael J. LeClerc, Rhonda McClure, Gordon L. Remington, and Paula Stuart Warren, c2006.

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----- **Organizing Your Family History Search: Efficient and Effective Ways to Gather and Protect Your Genealogical Research.** Cincinnati, OH: Betterway Books, c1999. **Genealogy (G) 929.1 CAR**

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subject specialists cited as authors.**

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