



Dana McDaniel Britton, Owner/Independent Contractor

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www.heritageresearch.net

Client Contract

Client Name: _____ Date: _____

Address: _____

Phone: _____ Email: _____

Research Objectives: _____

Research Hours Authorized: _____

Client Signature: _____

Responsibilities of Heritage Research:

- Thoroughly review information provided by the client.
- Develop a research plan that focuses on the needs of a particular client.
- Perform research on behalf of the client and analyze the findings.
- Issue a report discussing the conclusions based on the evidence collected.
- Communicate with the client throughout the project including periodic project updates and by addressing their questions or concerns in a timely manner.
- Should Heritage Research deem travel for research, obtaining genealogical documents or any other extra services necessary during the course of a project, prior permission will be secured from the client and reimbursable costs discussed. All documents ordered or collected will be forwarded to the client at the conclusion of the project.

Fees:

- An hourly rate of \$40 will be charged for research in the United States based on the agreed upon block of research hours, plus sales tax. Heritage Research is required by law to collect sales tax at a rate of 8.25%.
- An hourly rate of \$50 will be charged for research in foreign countries based on the agreed upon block of research hours, plus sales tax. Extra research hours will be added for transcription and translation of foreign language documents and communications.
- Fees reimbursable to Heritage Research: photocopies, fuel for travel, lodging, domestic and international record ordering fees, parking, postage, long-distance phone calls, international wire fees, microfilm orders and computer fees. Additional reimbursable fees incurred during the course of a project may also be assessed. Examples include, but are not limited to, fees for access to subscription services such as newspaper archives and public records databases.
- All invoices from Heritage Research are payable *upon receipt*.
- Heritage Research accepts checks, money orders or PayPal[®]. A convenience fee of 4% will be added to the invoice of all PayPal[®] transactions.

Confidentiality:

Heritage Research will keep all *personal* information of the client confidential. The client releases Dana McDaniel Britton dba Heritage Research from any confidentiality restrictions in regards to information that is a matter of public record or ordered disclosed by a court of law. A separate Client Release (below) will be completed by the client if they agree to allow Heritage Research to use their research product(s) in business marketing, professional portfolios, lectures, etc.

Responsibilities of the Client:

- Provide Heritage Research with all known information and/or materials relating to the research project. This includes copies of previous reports, vital records, oral family traditions, etc. The client must provide as much knowledge as they are able to avoid duplicating previous research.
- Answer all communications from Heritage Research in a timely manner.
- Provide clear research objectives.
- Promptly pay Heritage Research invoices.
- The client will refrain from using *any* research product obtained through Heritage Research in a threatening, fraudulent, harassing, or otherwise illegal manner.
- Research reports obtained through Heritage Research are copyrighted and shall not be reproduced, stored in a retrieval system, or transmitted by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission from Dana McDaniel Britton.
- A client must allow a reasonable amount of time for the completion of a project. Document order processing time, record analysis and many other factors can effect the length of time a project takes. A typical project can take up to two months or more to complete from the date of the contract. Work will begin upon receipt of the completed and signed contract.
- The discovery of evidence, and conclusions based thereon, that are contradictory to the client's preconceived notions of their ancestry is a risk undertaken by the client, not Heritage Research. Additionally, negative findings, or non-discovery of information, will still be compensated.
- In the event a client abandons a project they will be invoiced and expected to pay for any research hours performed, as well as any reimbursable fees incurred up to that point in the project. Abandonment will be considered if the client fails to perform *any* of their contractually agreed upon responsibilities within 60 days of the signing of this contract.

Instructions for Completing this Contract:

- This contract is a fillable PDF. You can fill and sign on your computer. You must officially "Sign" this document, save it and email it to dana@heritageresearch.net .
- You may also print this contract out and complete it by hand. Mail it to:

Heritage Research
P.O. Box 363
Garrison, TX 75946

Heritage Research Client Release

Dear Client,

Thank you for choosing Heritage Research for your genealogical needs. Your business is much appreciated. Professional genealogists wear many different hats. Beyond private research, sometimes this trade calls on us to be gatekeepers of genealogical standards, as well as train the next generation of researchers. This may include, but is not limited to: teaching, lecturing, blogging/writing for genealogical publications, etc. And as a business owner, marketing and providing clients with an up-to-date portfolio are essential. Additionally, pursuing professional excellence through the credentialing process is a requirement. In these situations, I prefer to use examples of family history research I've encountered in my work. However, I do not use a client's research product without permission. Please read below and initial all the options you feel comfortable with.

_____ I agree to allow Dana McDaniel Britton dba Heritage Research to use my research product(s) in lectures, educational classes, blog(s), commercial genealogical publications, business portfolio, professional credentialing activities, marketing, etc.

_____ I agree to allow Dana McDaniel Britton dba Heritage Research to use my name as a reference.

_____ I agree to allow Dana McDaniel Britton dba Heritage Research to publish my research product(s) in any form and credit me by name.

_____ I agree to allow Dana McDaniel Britton dba Heritage Research to publish my research product(s) in any form, but keep my identity confidential.

_____ I *DO NOT* agree to allow Dana McDaniel Britton dba Heritage Research to publish my research product(s).

Client Signature

Date