



Initial Consultation Report

Tara A. Fantauzzi, Professional Genealogist

The purpose of this report is to summarize the data and goals for your project. Please review the information in this report carefully and report if any additional information is known at project start or if any of the information should be changed or corrected.

Summary of Research Recommendations:

Client has a desire for genealogist to extract all of the historic records linked to his Ancestry member account for family tree titled 'LUDWIG Family Tree'. There are a total of 172 records linked to the family tree of client as reported on the Tree Overview page. As discussed with client there is no way to export all of the records linked at once instead genealogist must download each record one by one moving from one person to another to ensure all the records are obtained. After genealogist downloads each record those records will be added to the Customer Dashboard and some records will be annotated and transcribed like for example census records.

Genealogist also noted that 29 people in the tree have 101 'hints' linked to their identities. Client may want to review those hints and add more records to his family tree before data is extracted. Or, client may want genealogist to evaluate those 101 'hints' and add relevant 'hints' to the family tree for client. As hints are added the total number of records linked to the tree will increase and it will take more time for genealogist to extract up to 273 records if for example all 101 hints are relevant. It will be important for client to share with genealogist how he would like the 'hints' to be handled.

If only 172 records are to be extracted for client genealogist recommends applying up two minutes per record, which means a total of up to six hours correspondence time is recommended to be applied to extract and process all the records linked to the Ancestry member account of client titled 'LUDWIG Family Tree'. Genealogist will maintain a log of the time applied because each record will take a different amount of time to download and process, which means there is a chance that less than six hours will have to be applied to complete this task.

If client would like genealogist to evaluate the 101 'hints' and add relevant records to the Ancestry member account additional correspondence time must be applied at up to three minutes per record, which means up to another five hours correspondence time would be recommended to be applied.



If client would prefer genealogist only download the records and forgo any processing to those records then less time will need to be applied and genealogist will make adjustments to this report and lower the amount of correspondence time recommended.

Correspondence Time is a term we use to describe research tasks that involve direct contacts with government agencies, historical societies, or other entities to submit requests for documents; often including the completion of formal request forms, emails, or mail correspondence. Correspondence tasks are billed at half our normal research rate.

Itemized List of Research Recommendations:

Correspondence, Up to 6-hours correspondence time

- To extract and process 172 records from Ancestry member tree titled 'LUDWIG Family Tree'

Correspondence, Up to 5-hours correspondence time

- To evaluate, and when applicable add up to 101 'hints' to Ancestry member tree titled 'LUDWIG FamilyTree'; any new records added will be extracted and processed from Ancestry member tree