

Advanced Genealogy *Research Techniques*

+ 1607
Paris, France

+ 1864
Ellis Island

+ 1905
probate

+ 1916 marriage

+ 1921
San Francisco

+ 1929
market crash

+ 1940 Census

+ 1949 baptism

+ WWII

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Advanced Genealogy Research Techniques

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Photo by Tammy Patascher

George G. Morgan (left) and Drew Smith (right)

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He is the prolific author of hundreds of genealogy articles for magazines, journals, newsletters, and websites in the United States, Canada, the United Kingdom, and Singapore. He is the author of three editions of *How to Do Everything: Genealogy*. This is his eleventh book.

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George and Drew together produce The Genealogy GuysSM Podcast, the longest running genealogical podcast, published online at genealogyguys.com and enjoyed by thousands of listeners around the world.

Advanced Genealogy Research Techniques

George G. Morgan

Drew Smith



New York Chicago San Francisco Athl
London Madrid Mexico City Mil
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ISBN: 978-0-07-181651-9

MHID: 0-07-181651-8

e-book conversion by Cenveo[®] Publisher Services

Version 1.0

The material in this e-book also appears in the print version of this title: ISBN: 978-0-07-181650-2, MHID: 0-07-181650-X

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We dedicate this book with love and gratitude to all of our genealogy friends, from whom
~~we have learned and with whom we have shared over the years.~~ You make our journey
very special.

Acknowledgments

Introduction

CHAPTER 1 Examine the Brick Wall in Detail

Reexamine in Detail the Evidence You Have Already Discovered

Focus on Details You May Have Missed or Overlooked the First Time

Census

Birth Certificate/Index

Marriage License/Index

Death Certificate/Index

Obituary

Tombstone/Cemetery

Photograph

Now That You Have More Details...

Organize What You Have in a Genealogy Database Program

Names

Dates

Places

Create an Ancestor Timeline

Gather All of the Evidence You Have Collected

Organize Everything Sequentially

Reread Everything

Compile a Timeline

Incorporate Historical Newspaper Research

Example 1

Example 2

Example 3

Summary

Sources Used in This Chapter

CHAPTER 2 Use Brute Force

Indexes

Transcriptions

Extracts

Abstracts

OCR in Detail

Sources of Secondary Information

Family Histories, Online Family Trees, and Personal Web Pages

Application Forms to Societies and Other Organizations

The “Reasonably Exhaustive Search”

Example 1

Example 2

Example 3

Summary

Sources Used in This Chapter

CHAPTER 3 Go Around the Wall

The Broader Technique (and What to Call It)

Spouses

Parents and Children

Other Relatives

Beyond the “F”

Another Important Use of the FAN Club Technique

Other Names

Example 1

Example 2

Example 3

Example 4

Summary

Sources Used in This Chapter

CHAPTER 4 Talk to a Friend

Why Share a Brick Wall Problem?

With Whom Should You Share the Problem?

How to Share a Brick Wall Problem

Example 1

Example 2

Example 3

Summary

CHAPTER 5 Use Crowdsourcing

Genealogy Societies

Online Forums—An Overview

Electronic Mailing Lists

Electronic Message Boards

Facebook Groups, Google+ Communities, and GenealogyWise

Finding the Most Relevant Online Forum

The Etiquette of Online Forums

Blogs, Wikis, and Podcasts

Blogs

Wikis

Podcasts

Example 1

Example 2

Example 3

Example 4

Summary

CHAPTER 6 Apply Technological Solutions

DNA Testing: A Very Brief History

Types of DNA Testing

mtDNA Testing

Y-DNA Testing

Autosomal DNA Testing

Deep Ancestry

Mutations

Mitochondrial Eve

Y-chromosomal Adam

Haplogroups and SNPs

Ethnic Mixtures

Companies That Perform DNA Testing

Specialized Genealogical Software

GenSmarts

Clooz

Evidentia

Summary

CHAPTER 7 Hire a Demolition Expert

What Can a Professional Researcher Do for Me?

Professional Genealogist

Accredited Genealogist

Certified Genealogist

Other Organizations Representing Professional Genealogists

Geographic Specialization

Specialty Areas

Contracting with a Professional Researcher

If and When Things Go Wrong

Summary

CHAPTER 8 Rest Up and Attack the Brick Wall Another Time

Learn

Books

Articles

Blogs

Wikis

Recorded Audio and Video Programs

Practice

Monitor

Summary

CHAPTER 9 Put the Techniques to Work

Review the Evidence

Develop a Research Strategy

Determine the Questions You Want to Answer

Identify All Potential Resources

Obtain Exact Copies of the Original Records

Analyze Evidence and Develop Hypotheses

Keep a Research Log

A Paper Research Log

Use a Spreadsheet

A Blog as Research Log

Use Your Genealogy Database Program

Software Utility Programs

The Case of Mary Ann Reilly Smith

Some Final Remarks

Index

Acknowledgment

The creation of any book is always a collaborative effort that involves the knowledge, talents, and skills of many individuals. We would like to mention a few of the people who have helped us realize our vision for this book.

We want to extend our sincere thanks to members of the McGraw-Hill Education team. We are grateful to Roger Stewart, Editorial Director at McGraw-Hill Education, for his strong commitment and support for this book. We'd like to thank Amanda Russell, our Editorial Coordinator, for her excellent guidance and assistance throughout our production of each part of the book. A big thank you also goes to Megg Morin, editor of George's *How to Do Everything: Genealogy* books, who facilitated the beginning of this book's production. The McGraw-Hill Education team members are always highly professional, and we're very appreciative of the friendships we have formed with all the members of the team.

George would also like to thank the many readers of *How to Do Everything: Genealogy* who have asked, "When is the next book coming out?" and "How do I get past this brick wall?" The authors have long known that a more advanced book was needed, and the readers have provided the impetus to produce this volume.

We'd also like to thank our genealogy friends, colleagues, and podcast listeners. They have shared their experiences, proposed research strategies and solutions to difficult problems, and offered us the friendship and support. We all learn from one another, and we enjoy passing the knowledge forward.

When the Going Gets Tough...

The quest for information about our ancestors and their families can be exciting and fulfilling. The thrill of the chase provides countless opportunities to learn about the places they lived, the historical period in which they lived, the events that influenced them or in which they participated, and the other people in their lives. It is gratifying to place these people into context and to come to *really* know and understand them.

The hobby of genealogy is different from most other hobbies in that it often starts out very easy and then gets more difficult the more you work with it. Unless you're dealing with a comparatively recent adoption situation or a parent or grandparent who was reluctant to talk about their families, you can often begin your research and make quick progress in filling out the names of your parents, grandparents, and possibly even your great-grandparents. However, once you get past the information that the family already knows, and have exhausted information found in the documents you find in your own home or in the possession of close relatives, you will discover that you have to learn about how to locate and use records of genealogical interest, such as obituaries, census records, and vital records. You may again make significant progress and work back in time at least into the nineteenth century, although your success may be frustrated by dealing with ancestors who came from other countries and whose points of origin may be unknown. Your work may be stymied by places where the records aren't easily accessible or that are in a language that you don't speak.

At each generation, you're doubling the number of trails to follow, and some are going to be much easier than others. A few of these trails may connect to published genealogies that already provide excellent reference sources that lead to strong documentation. Most, however, are going to be untraveled territory. Sooner or later, you're going to be following that path through the dark forest of time, and come upon the dreaded brick wall. Your basic knowledge of genealogical research may prove insufficient to get past that wall, and you may become frustrated and discouraged.

This book is intended to help.

...the Tough Get Going

George's previous book, *How to Do Everything: Genealogy*, is written with the beginning genealogist in mind. It provides a basic set of research skills and identifies many of the common types of records available to researchers.

This book is not for beginners, but for those who have already mastered the level of content found in *How to Do Everything: Genealogy*, and who have now run up against brick walls and need some additional skills to make further progress. This means that we will assume that you already know about the various genealogical record types and where to find them, and that you already know the essential processes involved in searching for information both online and offline. We also presume that you have experience researching online using both Internet search engines and genealogy database sites, and that you already know the standard ways of entering, manipulating, and reporting genealogical information, especially using genealogy software.

So this book is going to take you to the next level by presenting you with a set of techniques that can help you make progress when the beginning methods aren't enough. It will also help you better comprehend and understand the content of some of the common genealogical evidence that you

The Brick Wall Metaphor (and Why It Matters)

The best way to learn something new is to relate it to something that you already understand or can easily visualize. This is why good educators, whether standing up in front of a classroom, leading a webinar, or writing a textbook, try to think about where their students are in the learning process and what they already are likely to know. We learn this way because our brains can quickly make new connections when they are linked to existing knowledge.

When we decided to write this type of book, we realized that our readers would need an easy way to remember these new techniques, a way to relate them to something that they could easily imagine. And if the problem faced by a genealogist is called a “brick wall,” then why not use the mental image of a brick wall as a way to explain how each of these research techniques works? Analogies are great “connectors” and we’ll use them to help you extend your knowledge.

So now, in your mind’s eye, imagine yourself standing in front of a dense forest. There is one entrance into the forest that is the beginning of a path, and your passage along that path is your genealogical research journey. The beginning of the path is analogous to yourself, and the path is easy to walk along because you already know an awful lot about yourself (whether from personal memory, the memories of others, or from documents you possess). What happens, however, when the path forks?

You can take the left fork (your father’s side of the family), or the right fork (your mother’s side). Again, unless you have already reached an adoption situation or you have a secretive or absent parent, either fork provides a distinct path that you can choose to move along. No matter which path at the fork you take, you can always return to the fork later and try the other path, too. As long as there are relatives alive to provide dependable information or documents to be found using basic genealogical research techniques, you can make good time as you walk along the path and make choices at each fork (as you move from generation to generation).

What happens when the path reaches a brick wall? It may be a high wall, so high that you can’t see over it, and it stretches across the entire path so that you can’t simply walk around it (at least not that you can see). Your progress along the research path has stopped. What choices do you have to help you make further progress? That depends a great deal on the approach you take from there.

Eight Ideas for Getting Past the Brick Wall

There are numerous approaches you can take, depending on what you want to learn and the place and time in which your ancestor lived.

- You can get up very close to the wall and examine the entire wall in detail, checking to see if there are any weaknesses you can push through.
- You can go back home, and return with a sledgehammer, and keep striking the wall as hard as you can until it gives way. That might take a while.
- You can examine the ends of the wall, and see if there’s a way to travel around it.
- You can return home and describe your brick wall to each person that you encounter. Maybe someone else has an idea for getting past that particular brick wall.
- You can get a large number of people to help you all at the same time. They can form a human pyramid that you can climb and that might help you over the wall.

- You can return home and bring back a ladder.
- You can hire a demolition expert who has years of experiencing in breaking through brick walls.
- You can give up, for now, and follow one of the other paths, and return to this brick wall later. Maybe it will have crumbled a bit or you'll have some additional ideas on how to get past it.

Could you visualize each of those solutions as a way to get past a brick wall? If so, you're ready to see how we turn the brick wall metaphor into realistic ways to attack and help solve your genealogical research brick wall problems.

Keep in mind that just one research technique may help you work past a brick wall and locate the evidence you seek. However, you may use a first research technique to seek out evidence for one type of fact and a second technique for another, related fact. You may actually employ *multiple techniques* in a particular sequence, or you may alternate back and forth as you gather and build a collection of evidence.

We collect genealogical information in many formats from many different places. Humans love to talk and write about themselves, and governments have long sought to document their citizens for a wide variety of reasons. The evidence that genealogists use includes original documents, books, letters, newspapers and periodicals, online databases and websites, verbal conversations, and many other sources. We search for these materials in many places. Unfortunately, we rarely obtain the evidence we seek in the chronological sequence as our ancestors lived their lives. We locate one piece of information here, another there, and yet another one somewhere else.

We also know that not all evidence is created equal. Some pieces of evidence are stronger and more accurate than others. Some items are primary sources of information while others are secondary. Some materials are original documents while others may have been derived from other materials. It is therefore essential to *cite and study* our sources so that we can effectively evaluate and weigh the evidence as we conduct our research.

Despite the attention we pay to the details, it is inevitable that we will encounter brick walls. These impasses can be extraordinarily frustrating, but they are not always impossible to get past.

What You'll Need Before You Set Out

No matter which technique you are learning to use, there are some basic preparations that you'll need to make before starting. Regardless of whether your genealogical research is basic or advanced, you first need to:

1. Identify your research goals and objectives. They can help ensure that you conduct a more thorough investigation and locate as many needed records as you want. Whenever planning any research, it is important to identify the person(s) whose information you are seeking and to define the question(s) you hope to answer. It is essential to consider the time period in which the person lived, the geographical location, the government and other record-generating entities in operation there and then, and what documents might have been created to record the fact(s) that you are seeking. Ask yourself, when you reach a logical stopping point in your research, what is it that you hope to have accomplished? Are you trying to identify an immigrant ancestor? Join a lineage society? Find all of the descendants of an ancestor in preparation for a family reunion? Or just take each of your lines as far back in time as you can until original documentary evidence runs out?
2. Identify your research questions. Do you want to know the maiden name of a female ancestor?

Are you trying to determine the ancestral hometown of an immigrant? Do you want to learn more about the military service of an ancestor and where that service may have taken him? The more specific your questions are, the easier it will be to stay focused and on track. Write them down and describe specifically what you want to answer.

3. Identify the resources that are most likely to be relevant to the place and time of the events involved with your research question. Don't limit yourself to only online databases and webpages. Be sure to include a combination of both printed *and* electronic resources.
4. For each goal and research question, consider what records were created at the location and the time your ancestor lived there. Consider the types of information that those records may have contained. Determine whether those records still exist and where they are now located. If the records no longer exist or can't be located, what other alternative source(s) may provide the same or similar details? Finally, you will need to discover where and how you can access those records.

If you have all of these things defined and clear in your mind, set them down on paper as your research roadmap. You are then ready to start your journey through that dense, sometimes dark, forest of history, and we'll show you in the next nine chapters what to do when that brick wall appears.

Not only will we describe each technique in detail, including some of the more common variations, but also we'll frequently provide case study examples that illustrate how the technique can be used in actual practice to break past brick walls. We'll also include images of documents and computer screenshots to illustrate the tools and techniques we use. We encourage you to retrace our research steps so that you gain first-hand, in-depth experience. We'll also relate stories of how we and other researchers have worked to solve brick walls. In the process, we hope that you will gain new insights and come up with new ideas to help you get past some of your own genealogical brick walls.

Examine the Brick Wall in Detail

Most of us have heard the expression, “The devil is in the details,” meaning that details are extremely important and that ignoring the details can result in serious problems later on. One popular example of this is commonly found in mystery fiction, such as novels and TV shows. We love the character of Sherlock Holmes because he notices details that others miss and, by noticing those details, he solves the mystery. On many modern TV crime dramas, the forensic scientists painstakingly examine the crime scene, collecting trace evidence that ultimately leads to information about how the victim died, where they died, and who committed the criminal act.

In some cases, the crime scene investigators and police detectives realize that they may have missed something important, and they go back to take another look at evidence that they had already reviewed. Not only does this bring to light things that were originally overlooked, but it also provides an opportunity to see the evidence in a new way because the investigator may have learned something since the last time the evidence was examined that will turn seemingly irrelevant or unimportant information into something relevant and important.

To return to our original brick wall metaphor, a close examination of the wall may discover a weak spot that can be exploited into a breakthrough. Clearly, this may take some time, hard work, and patience. Imagine taking a close look at every brick in that wall, seeing if it can be wiggled or removed. This is painstaking, exhausting work, but it may be all that stands between failure and success.

Now that you have that image in your mind of examining the entire brick wall in detail (perhaps using a flashlight and a magnifying glass) or, if you prefer, an image of yourself as a crime scene investigator, working to collect every tiny trace of evidence for processing in your crime lab, we can turn our attention to how this concept works in the real world of genealogical research.

Reexamine in Detail the Evidence You Have Already Discovered

When you are dealing with a genealogical brick wall, you have probably acquired a number of diverse materials already. These probably include numerous personal papers, family photographs, census records, vital records, newspaper clippings, and other information linked to the individual who is the subject of your brick wall. There may be other materials, including original documents or microfilm or digitized images of them, that you may not have found or accessed yet. These pieces of evidence may lead to a breakthrough in your brick wall, but you will still need to search for, locate, and obtain copies of them.

If you have not already done so, this may be a good time for you to digitize any relevant paper documents. This will enable you to quickly magnify the document on your computer screen, making some details easier to read and interpret, especially if they are photographs or if they contain handwritten information. (This will also make it easier for you to use some of the other techniques outlined in this book, such as those described in [Chapters 4, 5, and 7](#).)

You may also find it useful to have either one very large computer display screen or multiple computer monitors, enabling you either to put two documents side by side or to put a document alongside a list, report, or chart from your genealogy database software. We’ll talk more about genealogy software in a moment. Side-by-side examinations allow you to do such things as compare

one photograph with another, compare a household in one census with the same household in a later census, or compare one signature with another. This type of comparison often may cause an unusual detail to jump out at you that you had not noticed before.

When looking at a document that you have seen before, it is tempting to be skeptical that anything new will result from another look. After all, you may have looked at that document several times before, perhaps dozens of times. Would yet another look reveal anything new? Because this kind of work can be mentally exhausting, it is easy to give up too quickly, and in so doing, miss that critical clue that was staring you in the face the entire time. Often, too, when you reexamine a document, some piece of previously meaningless information may now yield an important new clue.

Before we get to specific cases, let's discuss some general ideas of what you are looking for.

Focus on Details You May Have Missed or Overlooked the First Time

For each type of common genealogical document discussed here, we'll start with what you likely noticed first, and then what details you may have failed to take note of. (Note that not every possible detail mentioned would appear in each type of record, as records vary depending upon the geographic location and the time period in which they are produced. The details listed are not intended to be an exhaustive list.)

Census

What you originally noticed:

- The year the census was taken
- The general geographic area (U.S. state/county, Canadian province/district, or British county/civil parish)
- The names of primary members of the household (parents, children) and their ages as they appear in the index

What you may have overlooked:

- The official enumeration date for that year's census
- The actual enumeration date listed at the top of the census form
- The details of the place being enumerated (such as a U.S. incorporated/unincorporated place, ward, township, institution, and enumeration district; a Canadian sub-district; or a British town, ecclesiastical parish, or registration district)
- The street address of the household
- Whether the residence was owned or rented
- The value of property
- The names of primary members of the household and their ages as they appear on the actual census image
- The sex, race, marital status, total number of children, number of living children, place of birth, places of their parents' births, occupation (or if they were a student), place they worked
- Who else lived in the household other than the heads of the household and their children (parents of the head of household, siblings, aunts and uncles, in-laws, boarders)

- Whether or not they were literate, and what language they spoke
- Who lived in nearby households (we'll come back to this detail in [Chapter 3](#))
- Other notations made by the census enumerator (perhaps above, below, or in the margins)
- Other non-population schedules you may not have investigated for the household

Birth Certificate/Index

What you originally noticed (see [Figure 1-1](#)):

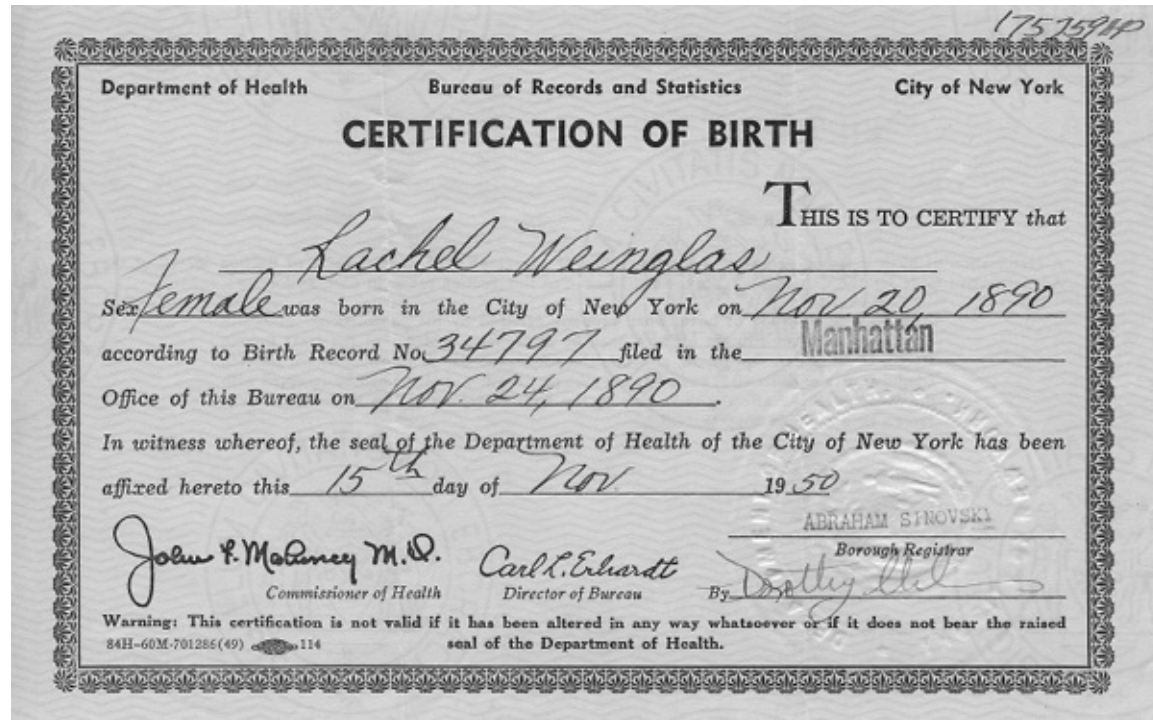


FIGURE 1-1 Birth certificate for Rachel Weinglas[s]. Note that this is a 1950 extraction of information for an 1890 birth.

- The general geographic area or jurisdiction for the place of birth
- The name of the child
- The date of birth

What you may have overlooked:

- The details of the place of birth (such as a town, a street address, or a particular hospital)
- The time of birth
- Whether the child was born alive or dead
- The sex and race of the child
- The name of an attending physician/midwife or of an informant
- The names of the parents
- The residence of the parents
- The occupation of the father

- The birthplaces of the parents
 - Other typed or handwritten notations (such as whether the child was a twin)
-

Marriage License/Index

What you originally noticed:

- The general geographic area or jurisdiction for the place of marriage
- The names of the marriage partners
- The date of the marriage

What you may have overlooked:

- The ages of the marriage partners
- The birth dates and locations of the marriage partners
- The date of the application for the license
- The date the license was issued
- The name and occupation of the person who performed the ceremony
- The names of the witnesses
- The date the license was returned
- The signatures of the marriage partners
- The names of others who were married on the same date at the same location (in other words, possible double marriages)

Death Certificate/Index

What you originally noticed (see [Figure 1-2](#)):

MARGIN RESERVED FOR BINDING

P.S.—WRITE PLAINLY, WITH UNFADING INK—THIS IS A PERMANENT RECORD. Every item of information should be carefully specified. AGE should be stated EXACTLY. PHYSICIANS should state CAUSE OF DEATH in plain terms, so that it may be properly classified. Exact state, county, and occupation is very important.

Registration Dist. No. 3407		STANDARD CERTIFICATE OF DEATH		51 009024	
Registrar's No. _____		Division of Vital Statistics—State Board of Health		State of South Carolina	
Birth No. _____		State of South Carolina		State File No. _____	
1. PLACE OF DEATH:			2. USUAL RESIDENCE:		
(a) County Newberry			(Where deceased lived. If institution: residence before admission)		
(b) City or town Chappelle, S.C.			(a) State S.C. (b) County Newberry		
(c) Length of Stay: _____ (in this place)			(c) City or town Chappelle		
(d) Full name of hospital or institution: _____ (If not in hospital or institution, give street address or location)			(d) Street address _____ (If rural, give location)		
3. NAME OF DECEASED:			4. Date of death:		
(Type of Print) Mr. James William Martin			(Month) July (Day) 8th (Year) 1951		
5. Sex: Male		6. Color or race: White		7. Married, never married, widowed, divorced: married	
8. Date of birth: Dec 10 1869		9. Age: 81 (In years last birthday)		10. Usual occupation: Retired farmer	
11. Birthplace: Edgefield Co. S.C.		12. Citizen of what country: U.S.A.		13. Father's name: Calmon Manly Martin	
14. Mother's maiden name: Salvina Adams		15. Husband or wife's name: Daisy J. Martin		16. Social Security No. _____	
17. Informant: Buddy Calbert		18. Cause of death:		MEDICAL CERTIFICATION	
I. Disease or condition directly leading to death* (a) Cerebral hemorrhage		Antecedent causes: hypertension		INTERVAL BETWEEN ONSET AND DEATH: 1 year	
Due to (b) _____		Due to (c) _____		II. Other significant conditions: 5	
19a. Date of operation: _____		19b. Major findings of operation: _____		20. Autopsy? NO	
21a. Accident (Specify) _____		21b. Place of injury: _____		21c. (City, Town, or Township) _____ (County) _____ (State) _____	
21d. Time (Month) (Day) (Year) (Hour) of injury: _____		21e. Injury occurred: _____		21f. How did injury occur: _____	
22. I hereby certify that I attended the deceased from Jan 51 , to July 51 , that I last saw the deceased alive on July 7th , 1951, and that death occurred at 10 m., from the causes and on the date stated above.					
23a. Signature: D. Schmode		23b. Address: Chappelle, S.C.		23c. Date signed: July 1951	
24a. Burial, cremation, removal: Burial		24b. Date: 7/9/1951		24c. Name of cemetery or crematory: Saluda Baptist Church	
24d. Location: Chappelle, S.C.		Date rec'd by local registrar: 8-5-51		Registrar's signature: L. E. Mack T.P.L.	
Funeral director: Beth's Service		Address: _____		FEDERAL SECURITY AGENCY PUBLIC HEALTH SERVICE Form No. 1004	

FIGURE 1-2 Death certificate for James William Martin

- The general geographic area or jurisdiction for the place of death
- The name of the deceased
- The date of death

What you may have overlooked:

- The details of the place of death
- The sex, race, and marital status of the deceased
- The name of the spouse
- The date and location of birth
- The age at death
- The occupation of the deceased
- The names and birthplaces of the parents
- The name and address of the informant
- Medical information relating to the death, such as time of death; whether the death was due to illness, accident, suicide, or homicide; specific cause of death; and name of the attending

physician

- The date and location of burial
- The name and address of the funeral home or undertaker
- Other notations on the death certificate

Obituary

What you originally noticed:

- The name of the deceased
- The date of death
- The age at death
- The names and relationships of survivors

What you may have overlooked:

- The names and relationships of survivors, spouses, and their places of residence
- The names and relationships of those who pre-deceased the deceased
- The cause(s) of death
- The names of pallbearers (both actual and honorary)
- Biographical details about the deceased (birth date and location, ethnic background, places lived and migration activity, occupations, education, religious affiliation, military service, organizational memberships, hobbies, awards)
- The location of the funeral service (religious facility, funeral home, or other place)
- The name of the person performing the funeral service and their religious affiliation
- The name and address of the funeral home
- The date and location of burial
- Memorial information

Tombstone/Cemetery

What you originally noticed:

- Name on the tombstone
- Dates of birth and death (or age at death)
- Relationship (husband, wife, father, mother, and so on)

What you may have overlooked:

- Style of the tombstone
- Quality of the tombstone (suggesting its cost)
- Age of the tombstone (original to year of death, or a later addition or replacement)
- Any indication of the producer of the tombstone

- Symbolism used on the tombstone, such as that indicating religious or organizational affiliation or military service
- Epitaphs
- Significance of multiple names on the same tombstone
- How multiple tombstones are positioned in relation to each other

Photograph

What you originally noticed (see [Figure 1-3](#)):



FIGURE 1-3 Photograph of Virginia and Corinne Martin

- People of primary interest
- Names, dates, and locations written on the photograph

What you may have overlooked:

- The name of the photographic studio
- Style of clothing
- Style of hair or facial hair
- How people are arranged in relationship to one another
- Whether or not people resemble one another
- Signs, structures, and landmarks in outdoor scenes
- Other things in the photograph (pets, furniture, jewelry, automobiles, other accessories, and so on)

Now That You Have More Details...

Clearly, we could continue to identify other types of documents, such as military records, immigration and naturalization records, city directories, maps, land and property records, wills and probate records, religious records, and all of the other common record types, and go through the same process of listing the things you'd likely notice first and the details you might have missed, but the examples already provided should give you the guidance you need to think about more details you should examine for any kind of genealogical record. Not only should all of this tell you that you should be looking at new documents carefully, but also that you should return to the same documents again and again, reexamining them for details that you may have missed the first time. We urge you to *reread documents* every time you look at them as if you have never seen them before. You may have learned new information since you last looked at a particular document, and now the seemingly unimportant scrap of information may take on greater significance.

Some of these details will point you to techniques that we will cover in later chapters. For instance, a puzzling detail in an index or abstract may lead you to seek out the original document (we cover this in [Chapter 2](#)). An unfamiliar name in a record may cause you to do some research to determine exactly who that person is (see [Chapter 3](#)). An unfamiliar place, term, or abbreviation may suggest that you should ask friends or people online to give their opinions (see [Chapters 4 and 5](#)).

Organize What You Have in a Genealogy Database Program

When you began your genealogical research process, you likely downloaded and installed genealogy database software in order to keep track of what you had discovered. It's simply not possible for you to remember everything that you find, and paper-based systems are difficult to search or to share with others.

So let's assume that you are using a typical genealogy software program that allows you to enter factual information found in the records you've discovered. You've entered personal names, dates, and places, and you have used standard citation templates so that you know exactly what type of evidence you used, where each item of information came from, and the quality of that source. Is that enough? No. Let's look at how you can use your genealogy software to keep track of details.

Names

What you probably entered:

- Given names (first and middle)

- Surnames
 - Suffixes such as “Jr.” or III
-

What you may have forgotten to enter:

- Prefixes (military, religious, or professional)
- Nicknames
- Alternate names (variant spellings, initialisms, aliases, translations)
- Notes about the name (where the name came from, such as a namesake; time frames during which a particular form or spelling of the name was used; specific documents in which the name was found)
- Your thoughts about why the name may have appeared in documents in an inconsistent manner (these can also be entered in the Notes area)

Dates

What you probably entered:

- As much as you knew of the year, month, and day, whether exact or an approximation

What you may have forgotten to enter:

- Alternative dates where the documents are vague or disagree with each other
- Notes about the date (whether the document provided an explicit date or whether the date was calculated from an age, such as found on a tombstone)
- Your thoughts about your confidence in the date and your process for coming up with a reasonable explanation for any date conflicts among documents (such as transcription errors, unreliable witnesses, or intentional misrepresentation)

Places

What you probably entered:

- The name of the place, together with the general geographic area in which it is found

What you may have forgotten to enter:

- The correct geopolitical area (county, province, parish, shire, district, or other designation) in which the place was located *at the time of the event*
- Notes about the place (the actual spelling as it appears in the document, alternate spellings, and other place details)

Create an Ancestor Timeline

Every piece of evidence you collect can provide you with some rather obvious information. Sometimes, however, these materials can supply additional important clues or suggest other details

- [From Apocalypse to Way of Life: Environmental Crisis in the American Century online](#)
- [download Nightingale's Lament \(Nightside, Book 3\) pdf, azw \(kindle\), epub, doc, mobi](#)
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- <http://nexson.arzamaszev.com/library/To-the-Ends-of-the-Earth--Scotland-s-Global-Diaspora--1750-2010.pdf>
- <http://dpsam.org.my/freebooks/Nightingale-s-Lament--Nightside--Book-3-.pdf>
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