

# Advice for Amateur Genealogists from an Amateur Genealogist

## Introduction

Let me be clear from the outset that I am *not* a professional genealogist. I don't even play one on TV. So what I offer here is *not* professional advice. Instead it is some of the accumulated experience I've acquired over nearly a decade as I've collected and organized information about my family's history and my wife's family history. Call it advice for amateurs from an amateur. Take it for what it's worth.

I began putting together my family tree shortly after my great aunt Eleanor and her husband died suddenly in a car crash. It made me realize that, of the ten children in my grandmother's family who survived to adulthood, only four of them were still alive. I had had the idea of assembling a family tree in the back of my mind for some time, but the sudden demise of Auntie and Uncle Francis made me realize that I was in a race against time to obtain information from my grandparents' generation.

So if you are considering starting a family tree (and, if you're reading this page I assume that you are), my first bit of advice is to **start now**.

## Getting Started

Genealogy is all about *obtaining* and *organizing* information about your family history. To do this you will need to identify sources of information and you will need some means of organizing that information.

### *Organizing and storing your information*

Since you will need to organize your information as soon as you start collecting it, you should give some thought to this ahead of time. It's certainly possible to construct a family tree by hand on paper, but this will quickly become unwieldy as it grows (my database currently has almost 2000 individuals). Fortunately there are a number of very good solutions for using the power of database technology to organize genealogical information. Some of these are PC-based – that is, the information is stored on your personal computer. Others are web-based – that is, the information is stored online. Each has advantages and disadvantages.

Most of the major commercial genealogy sites permit you to construct your family tree online for free. Apart from the obvious price advantage, storing your family tree online means that you don't have to worry about backing up your data, and it makes it easier to share your family tree with other people.

My personal preference, however, is a PC-based solution. I use [Family Tree Maker](#), which costs about \$40. There are a number of competing PC-based products (reviewed [here](#)) but, as I've never used them, I have no opinion about their merits. Another application, [Personal Ancestral File \(PAF\)](#) can be downloaded for free from [familysearch.org](http://familysearch.org), the genealogy website of the Church of Jesus Christ of Latter-Day Saints (the LDS or Mormon Church).

There are several reasons why I prefer keeping my family tree on my own computer. For one thing, FTM allows me to store not only genealogical data, but photos and other media as well. The user interface is richer and way faster than any of the web-based solutions, even using a broadband connection. Also, I can access my family tree on my laptop computer even when there is no Internet connection available.

It basically comes down to personal preference, but I strongly advise you to use some kind of database. You aren't necessarily locked in to your initial choice, since most solutions can export your family tree information (minus any embedded photos and documents) in a standard file format called [GEDCOM](#) (an acronym for **G**enealogical **D**ata **C**ommunications) – yet another of the many gifts to genealogical research by the LDS church, bless their hearts.

I also find it helpful to keep paper files on the individuals in my family tree. I can file copies of ship manifests, census records, etc. This way I can go back to the original sources later on.

### *Obtaining information*

The best place to start may well be the closest to home – your own memory. You probably have at least a general notion of the shape of your family tree. Start there, but keep an open mind – you'd be surprised at the number of facts that you “know” about your ancestry may prove to be wrong on further examination. Nevertheless, it's a good place to start, and an excellent jumping off point for the next step: contacting relatives.

Your living relatives are one of the best sources for genealogical information. Talk to them. Write them. Get information from the oldest living relatives that you are able to contact. For example, much of the information that I have on the Feder side of the family I've gotten from older relatives. My Feder grandparents are no longer living, but my father, my uncle, and one of their first cousins (who has since died) were able to provide loads of information. Also, this cousin's mother had dictated a family tree to my cousin, who wrote the whole thing down.

Once you get a handle on the basic structure of your family tree, you can reach out to relatives in each branch of the family for additional information. For example, as I mentioned above my grandmother was one of ten children in her family who lived to adulthood. I contacted one person in each of the other nine branches of her family for information on all of the descendants of that particular sibling.

A few hints about this process. First, **don't be shy**. Nearly all of the relatives that I contacted (not just in my family but in my wife's as well) were happy to participate, and really appreciative that I had taken on the project.

Second, **make it as easy as possible for them to help**. Provide them with forms that they can fill in or partial family trees that they can correct. Give them explicit instructions about what items of information you need (here's a sample letter that I've used). And provide them with a stamped, self-addressed envelope in which they can send their response. That can save them a few bucks and a trip to the post office.

Third, **make it worth their while**. No, I don't mean that you should pay them. But, by all means you should provide them with a copy of the results of your research. Send a copy with your request, and follow up with an updated version after you've entered the information they provided. Most relatives really appreciate getting a copy of the family tree that they can keep, and it's my sense that it increases their sense of "buy-in" in the project.

In my experience most relatives were only too happy to oblige. On a few occasions someone needed a reminder, but it was pretty rare to encounter someone who simply would not participate at all. If you do, then just move on to someone else.

One side effect of this effort is that affords an opportunity to make contact with relatives that you have fallen out of touch with, or perhaps never knew at all. Also, all of this digging may sometimes unearth a nugget of pure gold – like the time I contacted a cousin and he provided me with a copy of a memoir that his father had written in the 1950s about his childhood in Russia around the turn of the twentieth century. Nobody else in the family was even aware of its existence.

### *Documenting your sources*

#### **Keep track of your sources. Document every fact that you enter into your family tree.**

Anyone who's seen my desk knows that I am *not* a compulsive person. When it comes to documenting my sources, though, I try to be, if not compulsive, as meticulous as possible. Basically, my philosophy is that **if a fact is not documented by a source, it's worthless**.

Eventually you will almost certainly encounter "facts" from different sources that conflict with each other (more on that later). How will you assess these inconsistent facts to determine which is more likely if you don't know where they came from? What if you want to go back to a particular source to find related information – how can you do this if you don't know the source? *Perhaps* you'll remember it. But *really*, what are the odds that you'll be able to recollect the source of one out of thousands of items of data in your family tree database a year or two or ten after you've entered it?

Fortunately, family tree software makes it fairly easy to document your sources as you enter your data. FTM, for example, maintains a list of "master sources" (like a bibliography) that you've entered, and you can reference one or more of them whenever you enter a new fact. That way you only have to enter the full bibliographic information about the source once. After that, you just click on the source in the list of master sources and add a specific page cite (or any other footnote information). It does add a step to your data entry, but it's definitely worth it in the long run.

#### **Digging Deeper: Sources and Where to Find Them**

If you follow my suggestions above you should have a pretty good start on a family tree. In fact, depending on how ambitious you are, you may be done – that is, you may have found and documented everything you wanted to. And that's fine. It's really up to you.

However, you may want to dig deeper to find additional information that your family members were unable to provide. You may want to get additional details about the people who are in your family tree, or you may wish to go back additional generations and add more individuals. Either way, you'll need to expand your research to encompass public records and other sources.

In a way, we live in a golden age for genealogical research. The Internet brings vast amounts of genealogical information right to your desktop (or laptop). What in the past might have required a trip to the library, or the National Archives can now be accessed on your home computer. Accessed, but not necessarily accessed for free. Some of the commercial genealogy sites can get pretty pricey, so you may end up going to the public library anyway (unless you can get the public library to come to you – more on that later).

Here are some of the sources that I've found helpful, and ways to access them:

### *Social Security Death Index*

The Social Security Administration (SSA) maintains a "Master Death File," more popularly known as the Social Security Death Index (SSDI), which lists deceased individuals who had a social security number, and whose death was reported to the SSA. The SSDI lists date of birth, date of death, last residence, place where death benefit was sent, social security number, and place where the social security number was issued. The records were not computerized until 1962, so most of the early records are not available online.

You can use the SSDI not only to discover or confirm, e.g., dates of birth and death, but also as a means of getting at additional information that the subject of your research may have entered on the application for his or her social security card. The SSA will, for a fee, provide a copy of a deceased person's form SS-5. The SS-5 includes the applicant's place of birth, nationality, and parents' names and SSNs. You will need to send the SSA a request letter that includes the subject's name, dates of birth and death, and, if possible, social security number. Most of the commercial genealogy sites have a sample request letter that you can use.

All of the major commercial genealogy sites include the SSDI, but you can [access it for free](#) on [rootsweb.com](#). Rootsweb is [ancestry.com](#)'s free site.

### *Census records*

The decennial census is a treasure trove of information. Unlike modern censuses, where most people respond to a short form that is pretty much limited to the names and ages of individuals in a given household, earlier censuses included a host of questions about members of a household including parentage, marriage, occupation, language, and whether the head of household owned or rented the family home. All of this information was entered by hand onto ledger-sized sheets by census enumerators. These sheets were eventually microfilmed and deposited in the National Archives. They are kept confidential for 72 years, so, as of this writing, the most recent census that is available is the one conducted in 1930.

I've spent a fair amount of time researching census records. These are available on microfilm through the National Archives. They're also available online, but not for free. Ancestry.com has them available as image files, with indexes for certain years (several of the early ones, then 1920 and 1930). HeritageQuest (a genealogy-oriented offering of ProQuest) also has census records.

The National Archives recommends that you start with the most recent census and work your way backward. That's fine, but it's not how I've done it. I've generally started as far back as I could and worked my way forward. That allowed me to trace the growth of each family unit. I don't think there's a right or wrong here – you need to take the approach that you're most comfortable with.

Note that the census is organized geographically. When you look at a census image that has your family members, take some time to look at the other entries on the page. This will show you who your family's neighbors were when the census was taken. Sometimes this will turn up other relatives, or relations by marriage (oh, that's how Uncle Joe met Aunt Isabel!). It can also tell you something about how your relatives lived.

### *Passenger ship records*

Most Americans are descended from immigrants, and most immigrants came here on ships. Their arrival was documented on forms that were filled in by the shipping line and submitted to the US government. These passenger ship records have been microfilmed and deposited with the National Archives, and some of them are available on commercial genealogy websites.

One of the main entry points for immigrants coming to the US (particularly from Europe) was Ellis Island in New York harbor. Passenger ship records for immigrants who entered the country through Ellis Island are available [online for free](#). Searching them is tricky, though, since many entries have been mistranscribed into the index for the search engine. Also, the entries generally have the names that people used before they left Europe, which frequently differ from the names they used once they got here. There's also a [site](#) that makes searching the Ellis Island records easier.

### *Obituaries and death notices*

Death notices in the newspaper are a good source of information, but you need a bit of information to start with. I find them helpful because they can confirm an exact date of death, often list surviving family members who I might not otherwise know of, and sometimes tell me where a person was buried.

If you are researching obituaries at the library, you will have to start with the printed newspaper index, which will direct you to a specific issue and page. The actual newspapers will most likely be on microfilm or microfiche. Most newspaper indexes do not index death notices, which are announcements that families pay to put in the paper, rather than part of the editorial content of the paper like an obituary. So you will need to know the person's approximate date of death, and you'll have to troll through issues around that date until you find something.

If back issues of the newspaper have been digitized, full-text searching should be available. The [New York Times](#) can be searched from its website going back to 1851. Other newspapers may be available through commercial genealogy sites.

### *Birth and marriage announcements*

Like death notices, birth announcements are like paid advertisements. Wedding announcements, by contrast, are part of the paper's editorial content. Searching them is much like searching death notices and obituaries.

### *Birth and death certificates*

Birth certificates include, not only the date and place of birth, but also information about the child's parents. Death certificates contain, in addition to the date and place of death, information about parentage, occupation, cause of death, and date and place of burial. Birth and death certificates can be the most authoritative records of dates of birth and death that you will find.

The procedure for obtaining birth and death certificates vary from jurisdiction to jurisdiction. As a general rule you will have to write to the appropriate government authority and pay a fee to obtain a copy of the document. However, unlike the SSDI, they are not easily and freely accessible online. Some birth and death records are available through commercial genealogy websites, but not for free.

### *Tombstones*

Cemeteries can be a valuable source of information. At a minimum, dates of birth and death are generally inscribed on tombstones. Sometimes there's additional information as well. For example, on a Jewish tombstone the Hebrew rendering of a person's name will include a patronymic, giving you the given name of the deceased person's father.

People from the same family are often buried near one another, so a stroll around the general area where a person is buried may reveal other relatives, or possible relatives.

If there isn't a family member who can tell you where a person is buried, you can often determine this through death notices in the newspaper or through a death certificate. Once you've identified the right cemetery, the cemetery office can help you find the correct burial plot.

Some cemeteries have been "digitized" – that is, the inscriptions on the tombstones have been transcribed in a searchable, electronic form, and made available online. Some can be accessed through commercial genealogy sites. Others can be found on websites devoted to genealogy for a particular locality or region.

### *Commercial genealogy websites*

These are not sources as such, but aggregations of sources that are readily searchable. Usually there's a search box on the front page that allows anyone to search for a particular name in all of

the sources available on the site. The site will return abstracts of the records that contain your search term. To access the actual sources, however, you must be a paying subscriber.

While there is a proliferation of commercial genealogy websites, there is less variety than you may think. Ancestry.com, myfamily.com, genealogy.com, rootsweb.com and Family Tree Maker are all owned by the same company – [The Generations Network](#), based in Provo, Utah.

An alternative to subscribing to one of these services is to access them through your local library. Many libraries allow you to access these databases from computers on the library's premises. Some (like my local library) even allow you to access them from home by logging onto the library's website and entering your library card number. Check this out at your local library – it can save you some serious bucks.

### **Making it all Fit Together**

Sooner or later you will encounter facts that are irreconcilable, like two different birth dates for an individual. At other times you may come across facts that are impossible – like a date of death that precedes that person's date of birth, or a date of birth for a child that comes after the mother's date of death – or improbable – like a date of birth for a child that would make one or more of the parents unreasonably young or old.

My general approach in both cases is to record the fact, but somehow make the record reflect my doubts.

Family Tree Maker, the genealogy software that I use, handles irreconcilable facts pretty well. For example, you can record multiple dates of birth and designate one as the “preferred” date that shows up by default in all reports, family trees, etc. Choosing the preferred fact is mostly a matter of judgment. How many sources agree with one fact as opposed to another? Which sources are most susceptible to error? For example, for dates of birth a contemporaneous or near-contemporaneous source like a birth certificate or birth announcement is more likely to be accurate than birth date that was self-reported years later to a census enumerator or the Social Security Administration. Remember that just because a fact is found in an official record doesn't necessarily mean that it's accurate, particularly when the fact is self-reported and not subject to verification.

Family Tree Maker does not handle improbable results as well. It will generate a message if a result is impossible (e.g., birth following death), and give you the option to change the data entry. It also will generate an error report that can turn up unlikely facts. But it doesn't flag impossible or improbable results in a way that's easy to spot on regular reports, or allow you to search for items that you've flagged manually as unlikely. I generally note my doubts in a footnote when I enter source information for the questionable fact, along with any tentative conclusion I may have formed. What I'd love to see in a future release of the software is a check box that allows me to flag a fact as questionable or tentative.

## **Sharing with Others**

### *Sharing with family*

After mailing out a bunch of hard copies of my family tree, I came to recognize that it would be impractical to keep that up. It was labor intensive, time consuming, and, in aggregate, expensive.

The most obvious solution was to post the family tree on a website in formats that people could use – gedcom for genealogy buffs, and pdf for everyone else. I was concerned, though, about posting lots of personal information on the web where any identity thief could find it. This is where [myfamily.com](http://myfamily.com) comes in handy. Myfamily.com allows you to set up a password-protected website that is available by invitation only. You can post a variety of materials on the site, including photos, pdfs, and gedcoms. The site has a built-in facility for navigating an uploaded gedcom database. It also allows you to post messages, and will push out email notifications to all of the people who are subscribed to your site whenever new material is posted.

### *Sharing with the genealogy community*

Several of the genealogy websites allow you to post your family tree so that others may search it. This massive aggregation of family trees can be useful both for the information it contains and also for putting you in touch with other amateur genealogists who may be researching people in your family.

An important consideration before submitting a family tree to one of these sites is whether you will be releasing a bunch of private information to the general public. At the very least you should ensure that you “privatize” the information before posting. A “privatized” database omits personal details, like dates of birth, for all living individuals in your database. This function may be performed by your genealogy software, or by the website itself.

Generally, when you post to one of these sites you also submit an email address so that other amateur genealogists can contact you for further information. This may be accomplished by making your email address available, or through an email forwarding system that does not reveal your actual email address to the sender. Be aware of this and make sure you’re comfortable before posting anything.

Finally, some of these sites charge for accessing the information that you submit, and don’t even give contributors a break on the price. If you find this as irritating as I do, then avoid them.

## **Conclusion**

One final word before you embark on your genealogical efforts. This is a project that is never truly completed. There’s always a generation that proceeds the oldest person in your family tree. And, of course, your family tree is by its very nature a moving target. People will be born, get married, and die.

Don't let it overwhelm you. You can always put it down and come back to it later. Be master of the project; don't let it master you.

Jesse M. Feder, July 2008