

SCHEDULE OF FEES AND EXPENSES

I. EXPERIENCE AND EDUCATION

I am a professional genealogist specializing in research for the period from the 18th century to the 20th century in Upper Canada, Canada West and Ontario, as well as parts of the north-east United States. I also specialize in United Empire Loyalist research. I have been researching since 1992. I have access to the Archives of Ontario, the City of Toronto Archives, major religious archives in Toronto, the Toronto Reference Library and the North York Central Library, as well as a variety of other local repositories (museums, archives, public libraries, genealogy and family history society libraries) in Toronto and south-central Ontario, and several on-line subscription databases. I'm a member of the Association of Professional Genealogists, and the Ontario Chapter. I am also a member of the Ontario Genealogical Society, and local historical societies.

I have completed two Professional Learning Certificates in Genealogical Studies (Canadian Studies and United States Studies) through the Professional Learning Centre, Faculty of Information Studies, University of Toronto and the National Institute for Genealogical Studies. I have attended numerous specialization workshops at National US Genealogical Conferences, as well as at provincial and local conferences. I also have a certificate in Project Planning and Control from George Washington University, a certificate in Technical Manual Writing from Humber College, and a certificate in Photography from Sheridan College. I am a faculty member of the National Institute for Genealogical Studies specializing in courses for electronic resources (genealogical software programs.)

II. SERVICES AND FEES

Research Services include

- Review of information provided by the client
- Formulation of a research plan
- Carrying out the research
- In-depth evaluation and analysis of findings
- One or more written reports of findings, including negative findings
- Photocopies, transcriptions or abstracts of documents found, as appropriate
- Recommendations for future research

Hourly Fee

The regular hourly fee is \$30 CDN per hour of the genealogist's time for services described above; expenses are billed separately (see Expenses below.)

Retainer Fee

The minimum retainer is \$120 CDN for four hours of work time, payable in advance (non-refundable). For larger assignments on an hourly basis, the retainer fee will be negotiable, but will typically be between one third and one half of the expected commission for the assignment. For the following research packages, the retainer is indicated with each package. One-half of the package fee (minimum six hours) is non-refundable.

Other Services

Other services offered can include any combination of the following: photographing grave stones, buildings and local sites, and artifacts; scanning family documents and memorabilia into digital images; preparing family tree charts, creating web sites or creating DVDs from your compiled genealogical data and digital images of your family documents, artifacts, photographs and memorabilia; providing pre-publishing support to authors wanting to transform their family stories into professional looking printed books; and entering your genealogical data into a genealogical database program.

SCHEDULE OF FEES AND EXPENSES (CONT'D)

Research Packages

Services are also bundled in convenient packages:

Discovery Package: 6 hours \$180 CDN (full fee required in advance)

Pioneer Package: 10 hours \$295 CDN (full fee required in advance)

Traditions Package: 16 hours \$465 CDN (minimum \$240 (8 hours) required in advance)

Heritage Package: 24 hours \$690 CDN (minimum \$360 (12 hours) required in advance)

Legacy Package: 35 hours \$995 CDN (minimum \$480 (16 hours) required in advance)

The above packages include the cost of photocopies, but exclude the cost of obtaining certificates from various institutions. Other expenses are extra (see Expenses below.) Reports are provided after approximately 8 to 10 hours of work time as appropriate.

Any of the Other Services listed above can be included in any of the packages, but the amount of research hours will decrease. The other services must be negotiated into the project costs at the beginning before the assignment is commissioned.

III. EXPENSES

Reimbursable Expenses

Incidental expenses that can be incurred on behalf of the Client include, but are not limited to, the actual cost of photocopies (unless waived) and microfilm copies, microfilm/fiche rental, the cost of obtaining certificates, postage, parking fees at research facilities, subway tokens, long distance telephone calls or fax transmissions, travel expenses at a rate of 30¢ (CDN) per kilometer, and other necessary incidental expenses, provided the total of the expenses doesn't exceed the amount agreed to by the client.

Out-of Area Travel Expenses

Out of area travel expenses can include airline tickets (coach class, advance purchase) and car rental, or taxi or shuttle bus fare in lieu of car rental, and lodging plus taxes if an overnight stay is required. Out of Area travel will only be undertaken with prior approval of the Client.

IV. GUARANTEE

I can make no guarantees regarding what information, if any, may be found or what conclusions may be drawn from it, nor predict in advance the time needed to find information or prove facts or relationships, and that the risk of non-discovery, or discoveries to the contrary of those desired, is on you, the Client, and not me, the Genealogist.

V. REFUND POLICY

Because each Client's project is unique, I do not offer refunds once the work has been commissioned. However, if a research project takes less time than was initially paid for, the excess time can be applied towards another project or a rebate for unused time over the minimum non-refundable fee less any unpaid expenses, will be made at the Client's request.