
PROJECT STAGE

STATUS

Initial Consultation Free Services

Professional Genealogist Tara A. Fantauzzi will review all of the research you have completed previously on your family history. Clients are encouraged to provide anecdotal information as well as primary and secondary documentation, including vital, census, and other record types. After a thorough review of your case, genealogist will prepare a itemized list of recommendations for the client. Please note that in rare cases, when the client submits research requiring more than four hours of genealogist time to review, client may incur charges.

(a) Process not started yet (b) In progress (c) Complete

Stages of the Initial Consultation Phase:

(1) [Welcome Packet](#)

(a) Welcome Packet not submitted yet (b) Welcome Packet incomplete (c) Need more info from client (d) Welcome Packet complete

(2) Phone Consultation | Information Gathering

(a) Not yet scheduled (b) Scheduled (c) Completed (d) Not necessary

(3) Initial Consultation Report Delivery

(a) Report not scheduled yet in calendar (b) Report preparation scheduled in calendar (c) Currently working (d) Report complete

(4) Phone Consultation | Feedback

(a) Not yet scheduled (b) Scheduled (c) Completed (d) Not necessary (e) Waiting for Client

(5) Quote and Research Agreement (QRA)

(a) QRA pending client feedback (b) QRA is being prepared and will be delivered soon (c) QRA delivered, waiting for signed research agreement and/or retainer from client (e) Initial Consultation Phase complete

Research Cycle

Genealogist will execute research objectives according to client specifications. Upon completion of research, genealogist will deliver a suite of research deliverables, including .GEDCOM file, Document Appendix, and Summary Report. In addition to research results, the summary report will include a summary explanation of our research recommendations for future work. Recommendations will also be shown as an itemized list in the Summary Report. A Quote will be provided with the balance due on your project, as well as a list of charges for each recommendation should you choose to pursue additional work.

At the conclusion of the research cycle client returns to the '(4) Phone Consultation Stage' (above)

(a) Process not started yet (b) In progress (c) Complete

Stages of the Research Cycle:

(1) Research Progress

(a) Research time not yet scheduled in calendar (b) Researched in calendar (c) Waiting for documents to arrive in mail, or waiting for scheduled correspondence (d) Research complete, analysis time in calendar (e) research and analysis complete

(2) Reporting Progress

(a) Research pending (b) Report preparation in calendar (c) Report preparation complete

(3) Final Report

(a) Report not yet completed (b) Final Report not yet scheduled (c) Final Report in calendar (d) Final report and research recommendations delivered
