The Complete Genealogy Research Guidebook

Uncovering the Stories That Shaped You

From Sharon Virts

A Comprehensive Guide to Family History Research

Every family is a story worth telling.

Why Genealogy Matters

Every story begins with family. Genealogy is the art and science of tracing those stories across time — reconstructing lives from the fragments they left behind in records, letters, photographs, and memory. Whether you are writing historical fiction, seeking medical history, or simply trying to understand who you are and where you come from, genealogy offers one of the most rewarding intellectual journeys a person can undertake.

The same dynamics that bring fictional characters to life — love, ambition, loyalty, hardship, migration, and reinvention — exist in every family tree. The difference is that these are real people. Real decisions. Real consequences that echo through the generations and, ultimately, into your own life.

This guidebook will take you far beyond the basics. You will learn not only how to find records, but how to read them critically, how to pursue leads when the trail goes cold, how to decode naming conventions and cultural patterns, and how to think like a historical detective. Most importantly, you will learn how to transform raw data into a living narrative.

REMEMBER	You do not need to go back centuries to find meaning. Every generation has a story. Start with what you know. Build outward from there. And never underestimate a small detail — in genealogy, a seemingly trivial clue can unlock entire branches of a family tree.

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STEP 1 Start with What You Know

The most common mistake new genealogists make is to rush immediately to online databases and start searching for records. Before you do that, you must build your research foundation at home. The information you already possess — or can obtain from living family members — is your most valuable starting point.

Building Your Research Foundation

Begin by documenting everything you know about your immediate family, then work outward generation by generation. For each person, try to capture:

- Full legal name (including maiden names for women)
- Date and place of birth
- Date and place of marriage (and all marriages, if more than one)
- Date and place of death and burial
- Occupations throughout their life
- Religious affiliation
- Known addresses and residences
- Military service
- Siblings and their families
- Family stories, even ones that seem uncertain or apocryphal

PRO TIP	Write everything down — even details that seem small or uncertain. Note the SOURCE of each piece of information (who told you, which document, etc.). Mark uncertain information with a question mark or note 'unverified.' You will be building a research log, not just a family tree. Source citations are the backbone of good genealogy.

Setting Up Your Research System

Organization is not optional in genealogy — it is essential. From day one, establish a system that will scale as your research grows.

Digital Organization

- Use genealogy software (Ancestry.com, FamilySearch, MacFamilyTree, Gramps for open-source) to organize your tree
- Create a consistent file-naming system for scanned documents: SURNAME_Firstname_RecordType_Year (e.g., JOHNSON_Thomas_CensusRecord_1880)
- Maintain a Research Log — a document or spreadsheet tracking every search you conduct, what you found (or did not find), and what questions remain
- Back up everything to the cloud and an external drive

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Paper Organization

- Use a binder system organized by surname or family unit
- Place original or photocopied documents in archival-quality sleeves
- Keep a master index of all physical documents

CAUTION Never write on original documents. Never use tape, rubber bands, or acidic folders. Originals are irreplaceable. Always work from copies.

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STEP 2 Talk to Family Members

Living family members are your most irreplaceable resource. Unlike documents, they can answer follow-up questions, correct misconceptions, and provide emotional context that no record can capture. But this resource is finite — every year that passes, voices and memories are lost forever.

Conducting a Genealogical Interview

A good genealogical interview is not just a casual conversation. It requires preparation, active listening, and careful documentation.

Before the Interview

- Review what you already know about this person and their branch of the family
- Prepare open-ended questions — avoid yes/no questions that shut down conversation
- Bring a voice recorder (with permission) and a notepad
- Bring photographs, documents, or family heirlooms as conversation starters

Key Questions to Ask

- Tell me about your earliest memories of your parents and grandparents.
- What were their personalities like? What did they value?
- Where exactly did the family come from in the old country or another state?
- Why did they move? When did they leave?
- What language or dialect did they speak at home?
- What was their religion, and how observant were they?
- Do you know of any family members who left and were never heard from again?
- Were there any family disputes, estrangements, or secrets?
- What stories were told again and again at family gatherings?
- Do you know where they are buried?
- Are there any old letters, photographs, Bibles, or documents in the family?

PRO TIP	Family Bibles are genealogical gold. Many 19th-century families recorded births, marriages, and deaths in the front pages. If anyone mentions a 'family Bible,' ask to see it immediately and photograph every page — especially the records pages.

After the Interview

- Transcribe notes or recordings as soon as possible while memory is fresh
- Write down not just facts but context: the stories, emotions, and uncertainties
- Send the person a summary and ask them to correct anything you misunderstood
- Make note of every new name, date, or place mentioned — each is a research lead

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Managing Family Myths and Oral Tradition

Family stories are invaluable — but they are also frequently garbled by time and retelling. Common distortions include:

- Dates compressed or expanded by generations (a story about a great-great-grandfather may be attributed to a grandfather)
- Names changed or confused (particularly with repeated family names across generations)
- Immigration stories simplified (the ‘we came from Ireland’ story may obscure a complex multi-stage migration)
- Painful truths softened or omitted (illegitimacy, mental illness, poverty, crime)
- Ethnic or racial identity altered (particularly in families with mixed heritage or those who passed as another race)

IMPORTANT	Treat every oral tradition as a hypothesis, not a fact. Your job is to find documentary evidence that either confirms, refines, or contradicts the story. The truth is almost always more interesting than the myth.

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STEP 3 Decoding Names to Reveal Lineage Links

Naming patterns are one of genealogy's most powerful — and most underutilized — tools. Before the 20th century, names were rarely chosen simply because parents liked them. Names carried deep meaning, reflected family loyalties, and followed predictable patterns that you can learn to read like a code.

Understanding Traditional Naming Conventions

The Anglo-American Pattern (17th–19th Century)

In British and American families of the colonial and early national period, a fairly consistent pattern governed naming:

Birth Order	Son Named After	Daughter Named After
First son	Father's father (paternal grandfather)	Father's mother (paternal grandmother)
Second son	Mother's father (maternal grandfather)	Mother's mother (maternal grandmother)
Third son	Father himself	Mother herself
Fourth son	Father's oldest brother	Mother's oldest sister
Fifth son	Mother's oldest brother	Father's oldest sister

This pattern was not universal — it was a tradition, not a rule — but it was followed closely enough that it can help you identify likely grandparents when records are sparse.

Middle Names as Maiden Name Preservation

By the early 19th century, it became common in Anglo-American families to use the mother's maiden name as a child's middle name. This practice was especially prevalent in the American South and in families with strong clan identities. For example:

- A child named 'James Calloway Smith' might have a mother whose maiden name was Calloway
- 'Mary Virts Johnson' might have a mother or grandmother surnamed Virts
- This convention can help you trace maternal lines that are otherwise invisible in records

PRO TIP

When you encounter an unusual middle name — especially a surname-like name — always
search for that name as a maiden name or maternal family connection. It is one of the most reliable breadcrumbs left by earlier generations.

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Name Variants and Spelling Instability

Before widespread literacy and standardized spelling, names were recorded phonetically by clerks, ministers, and census enumerators who wrote what they heard. The same person might appear under dramatically different spellings across different records.

Common Patterns of Name Variation

Variant Type	Examples
Phonetic spelling	Schmidt / Schmitt / Smit / Smith
Translation to English	Mueller / Miller; Zimmermann / Carpenter; Koch / Cook
Anglicization of first names	Johann / John; Wilhelm / William; Katarina / Catherine
Abbreviation	Wm. for William; Thos. for Thomas; Chas. for Charles; Jno. for John
Nicknames recorded as legal names	Betsy for Elizabeth; Polly for Mary; Nancy for Ann; Peggy for Margaret
Sound-alike variants	Calloway / Callaway / Kelloway / Galloway
Prefix confusion	O'Brien / Brien; MacGregor / McGregor / Gregor

CRITICAL TRAP

'Jno.' in old records is NOT an abbreviation for 'John O.' — it is a historical abbreviation for 'John.' This confuses many beginners. Similarly, 'Wm.' = William, 'Thos.' = Thomas, 'Chas.' = Charles, and 'Jas.' = James.

Using Names to Identify Family Clusters

When you find a cluster of people with the same unusual surname in a county or township, they are almost certainly related. Look for:

- All households with your target surname in a county census — map their neighbors
- Witnesses on documents (wills, deeds, marriage bonds) — witnesses were almost always family members or close neighbors
- Godparents and sponsors in church records — typically close relatives
- Men with your target surname appearing as administrators or heirs in another man's estate — likely brothers, sons, or nephews

PRO TIP

The 'cluster research' method: research not just your direct ancestor but everyone around them — neighbors, witnesses, fellow church members. This group often migrated together and intermarried across generations. Understanding the cluster illuminates the individual.

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STEP 4 Reading and Interpreting Census Records

The United States federal census, conducted every ten years since 1790, is the backbone of American genealogical research. But census records are not self-explanatory. To extract their full value, you need to understand what each census year recorded, what its limitations are, and how to read between the lines.

Overview of U.S. Federal Censuses

Census Year	What It Recorded
1790–1840	Head of household only; other members counted by age/sex brackets. No names for family members.
1850–1860	All free persons named; age, sex, birthplace, occupation, real estate value. Slaves listed separately.
1870	First census post-Civil War; all persons named including formerly enslaved; birthplace of parents added.
1880	Relationship to head of household added (crucial!); birthplace of each person's parents added.
1890	Almost entirely destroyed by fire. Only fragments survive — check Civil War veteran schedules.
1900	Month and year of birth; immigration year; years married; number of children born and surviving.
1910	Language spoken; whether employer, employee, or self-employed; Civil War veteran status.
1920	Year of naturalization; native language; employer/employee status.
1930	Age at first marriage; whether a radio set owned; war in which served.
1940	Highest grade of school completed; income; location 5 years prior — powerful migration tracker.

How to Read a Census Entry

A census entry is a snapshot of one household on one day. To interpret it correctly, you must understand its structure and its limitations.

The Basics

- The FIRST person listed in a household is the 'head.' Everyone after is listed by their relationship to the head (wife, son, daughter, boarder, servant, mother-in-law, etc.).
- Ages are notoriously inaccurate. People frequently did not know their exact age, and enumerators estimated. Treat ages as approximations, typically within 3–5 years.

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- Birthplaces are the STATE or COUNTRY of birth, not the town. 'Virginia' in 1880 could mean any of 150 counties.
- The census captures one moment in time. Children already married or moved out will not appear. Grandparents living next door are in a separate entry.

Reading the Neighborhood

Always look at the pages before and after your ancestor's entry. In the 19th and early 20th centuries, relatives frequently lived adjacent to one another. A daughter who married and moved out would often live nearby. Siblings frequently farmed neighboring parcels. The names around your ancestor may be their in-laws, siblings, or parents.

PRO TIP	After finding your ancestor in a census, look at the 10–20 households before and after them. Record every surname. These are your research neighbors — many will be relatives. Cross-reference them across multiple census years to track family movements.

Key Red Flags and What They Mean

- An elderly person listed as 'mother-in-law' or 'father-in-law' — this is actually the HEAD's parent-in-law, meaning the SPOUSE's parent (not confusingly the in-law of the head's mother)
- A child with a different surname in the household — could be a stepchild, a nephew, a child from a previous marriage, or an informally adopted orphan
- A gap in children's ages (e.g., children aged 14, 12, 8, 6) — suggests a child died between the 8- and 12-year-olds
- 'Keeping house' as an occupation for a woman — standard term, means nothing unusual
- 'Cannot read' or 'Cannot write' — valuable for understanding the person's background and era
- An unusually large household with unrelated surnames — may be a boarding house, farm with laborers, or institution

Slave Schedules (1850 and 1860)

If you are researching ancestors who were enslaved, the slave schedules of 1850 and 1860 list enslaved people by age, sex, and color, but NOT by name. They are organized by slaveholder. This means:

- You can use the schedule to identify approximately how many enslaved people a particular slaveholder held and their demographics
- To identify individuals, you must cross-reference with estate records, plantation records, freedmen's records, and the 1870 census (the first to name all persons)
- Many freedmen took the surname of their former enslaver. Others deliberately chose a different surname to mark their freedom. Both patterns are historically documented.

IMPORTANT NOTE	Researching enslaved ancestors requires different strategies. See the dedicated section on African American Genealogy later in this guide.

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State and Non-Federal Censuses

Many states conducted their own censuses in the years between federal counts — often in years ending in 5 (1855, 1865, 1875, etc.). These can be invaluable when a decade between federal censuses represents a critical research gap. Check your state archives for availability. Notable state censuses include:

- New York (1855, 1865, 1875, 1892, 1905, 1915, 1925) — exceptional detail
- New Jersey (1885, 1895, 1905) — includes birthplace of parents
- Iowa (1885, 1895, 1905, 1915, 1925) — well preserved
- Massachusetts (1855, 1865) — occupations and birthplaces
- Canada (1851, 1861, 1871, 1881, 1891, 1901, 1911) — for families with Canadian roots

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STEP 5 Online Tools and Digital Databases

The digital revolution has made genealogical records available on a scale that would have been unimaginable a generation ago. Billions of records are now accessible from your home. But knowing which database holds which records — and understanding each resource's strengths and limitations — is what separates effective researchers from frustrated ones.

The Major Platforms

Ancestry.com

The largest commercial genealogy platform, with over 40 billion records. Key strengths:

- Comprehensive U.S. census collection (1790–1940, with some 1950)
- Vital records (birth, marriage, death certificates) for most U.S. states
- Military records, draft registrations, pension files
- Immigration and naturalization records
- City directories, land records, newspaper archives
- AncestryDNA: the largest consumer DNA database in the world
- Other members' family trees — valuable but treat as leads, not facts

FamilySearch.org

Run by The Church of Jesus Christ of Latter-day Saints. Free access. Key strengths:

- Over 13 billion records, many exclusive to this platform
- Strong international coverage: Scandinavia, Germany, UK, Latin America, and more
- Microfilm digitization project converting millions of records from physical film
- Collaborative family tree (the Family Tree) — public and editable
- Access to records not available on Ancestry, including many church records
- FamilySearch Centers (formerly Family History Centers) at LDS meetinghouses worldwide offer access to restricted records

FindMyPast.com

Strong focus on British Isles, Ireland, Australia, and Canada. Essential for:

- Irish records (particularly pre-Famine)
- English and Welsh parish records
- British newspaper archives
- Australian immigration and convict records

MyHeritage.com

Strong European coverage and DNA testing. Notable for:

- Central and Eastern European records
- Photo enhancement tools (upscaling, colorization)

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- DNA matching with a large European database
- Records from countries with fewer options on other platforms

Specialized and Free Resources

Resource	Best For
FindAGrave.com	Cemetery records, photographs of gravestones, obituaries
BillionGraves.com	GPS-tagged gravestone photographs, transcriptions
Fold3.com	U.S. military records, pension files, Civil War records (subscription)
Newspapers.com / GenealogyBank.com	Historical newspaper archives, obituaries, announcements
AmericanAncestors.org	New England records, NEHGS library (subscription)
HeritageQuest	Accessible through public libraries; census, local histories
Cyndi's List (cyndislist.com)	Annotated directory of 330,000+ genealogy links, organized by topic
USGenWeb.org	Free volunteer-contributed records organized by state and county
WorldCat.org	Locate books and resources held at libraries worldwide
Google Books / HathiTrust	Digitized county histories, local genealogies, published family trees

PRO TIP Your public library is a genealogy goldmine. Most large public libraries offer free access to Ancestry Library Edition, HeritageQuest, and newspaper databases through their digital resources. Some libraries provide access from home with your library card.

DNA Testing for Genealogy

DNA testing has become an indispensable tool for genealogists, capable of confirming relationships, breaking through brick walls, and revealing family connections that no document can establish.

Types of DNA Tests

- Autosomal DNA (atDNA): Inherited from all lines, tested by Ancestry, 23andMe, MyHeritage, FamilyTreeDNA. Best for finding cousins up to 4th or 5th degree. Effective for both male and female lines.
- Y-DNA: Passes from father to son unchanged. Tests only the direct paternal line. Essential for surname studies and paternity questions. Only available from FamilyTreeDNA.
- mtDNA (Mitochondrial): Passes from mother to all children, but only daughters pass it on. Tests only the direct maternal line. Useful for deep ancestry but changes slowly — matches may be very distant. Only FamilyTreeDNA.

Maximizing DNA Results

- Upload your raw DNA data to multiple platforms to maximize matches (GEDmatch, MyHeritage, FamilyTreeDNA all accept uploads)
- Build out the trees of your DNA matches to identify the common ancestor

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- Use the ‘Leeds Method’ to cluster matches into family groups
- Test older relatives whenever possible — each generation carries more DNA from earlier ancestors
- The Shared cM Project (dnapainter.com) provides probability tables for what relationship corresponds to a given amount of shared DNA

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STEP 6 Archives, Libraries, and Offline Records

Despite the digital revolution, the majority of genealogical records have not been digitized. Physical archives hold land records, probate files, church registers, court minutes, letters, and photographs that exist nowhere online. Learning to navigate these institutions is what separates good genealogists from great ones.

Types of Archives and What They Hold

County Courthouses

Often the richest source of genealogical records at the local level:

- Deed books: Real estate transactions recording property transfers, often with relationship information
- Will books and probate records: Wills name heirs, often revealing family structure in detail
- Administration records: When someone died without a will, the court appointed an administrator — usually the spouse or eldest son
- Guardianship records: When a minor's father died, the court appointed a guardian — usually a close male relative
- Marriage bonds and licenses: Often include witnesses, bondsmen (usually relatives), and ages
- Tax lists: Available even in years between censuses, showing who owned land and personal property
- Court minutes: Appearance records, lawsuits, name changes, and other legal matters

State Archives

State archives preserve records that courthouse fires (a frequent genealogical disaster) may have destroyed at the local level:

- Birth, marriage, and death registration records (the start date varies widely by state, from 1842 to 1920)
- State census records
- Pension and veterans' records
- Naturalization records
- Prison and institutional records
- Land grant records

The National Archives (NARA)

The U.S. National Archives holds federal records of enormous genealogical value:

- Federal census records (1790–1950)
- Military service records and pension files (Revolutionary War through WWII and beyond)
- Passenger arrival records (ship manifests, 1820–1957)

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- Naturalization records
- Land entry files (homestead claims, military bounty land)
- Records of the Bureau of Refugees, Freedmen, and Abandoned Lands (Freedmen's Bureau)

PRO TIP	NARA has regional facilities across the country, each holding records specific to their region. Before visiting Washington D.C., check whether the records you need are held at a regional facility closer to you. See archives.gov for facility locations and holdings.

Reading Probate and Will Records

Probate records are among the most genealogically rich documents available. A will or estate inventory can reveal:

- The names of all children — including married daughters (whose surnames can otherwise be impossible to find)
- The names of grandchildren, especially if the testator left them specific bequests
- Names of sons-in-law, daughters-in-law, and siblings
- The existence of deceased children ('to my daughter Mary's children, I bequeath...')
- Property owned and its approximate value
- Enslaved people held and sometimes their names and families (in pre-Civil War Southern records)
- Personal relationships and family dynamics

When reading a will, pay attention not just to who receives bequests, but to who was CUT OUT. A will that names seven children but your research has identified eight may mean a falling out — or a child who died — or a child who was already given their share. Each possibility is a research lead.

WATCH FOR	Wills often use the phrase 'natural children' or 'lawful heirs.' In historical legal language, 'natural children' can sometimes refer to illegitimate children (children born outside of marriage). Context and careful reading matter.

Church and Religious Records

Before civil vital registration became universal, churches kept the only records of births (baptisms), marriages, and deaths (burials). These records often contain detail that official government records do not:

- Baptism records: parents' names, godparents' names, date of baptism (note: not date of birth)
- Marriage records: sometimes parents' names, witnesses, and places of origin
- Burial records: age at death, sometimes cause of death, surviving family
- Confirmation, communion, and membership records

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To find these records, identify your ancestor's denomination and then locate the specific congregation they belonged to. Many records have been deposited with state or denominational archives.

Vital Records: Birth, Marriage, and Death Certificates

Official civil registration of vital events began at different times in different states. Understanding what a certificate records — and its limitations — is crucial:

Birth Certificates

- Record the child's name, date and place of birth, and parents' names
- Often include parents' ages, birthplaces, and occupations
- The informant (who provided the information) may be listed — important if parents were not present
- Early certificates may lack the mother's maiden name — a significant limitation

Marriage Certificates and Records

- Marriage licenses, bonds, or certificates record the date, names of bride and groom, and witnesses
- Often include ages and birthplaces
- Some states required parental consent for minors — these records can help establish parentage
- Look for the marriage return (the document filed by the officiant) as well as the license

Death Certificates

- Include date and place of death, cause of death, and place of burial
- Typically include birthplace and parents' names — but the informant often did not know these accurately
- The informant is usually identified (spouse, child, neighbor) — use this to evaluate reliability
- Medical cause of death uses historical terminology: 'dropsy' = edema/heart failure; 'consumption' = tuberculosis; 'flux' = dysentery; 'putrid fever' = typhus or typhoid

PRO TIP	On death certificates, always note who the informant is. If it is a child of the deceased, they may not know their grandparents' names accurately. If it is a spouse who emigrated from the same town, they may know the parents' names precisely. Evaluate the reliability of each data point based on the informant's likely knowledge.

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STEP 7 Pursuing Leads When the Trail Goes Cold

Every genealogist eventually hits a brick wall. A family disappears from records. A name is too common to trace. A courthouse burned. An ancestor arrived with a changed name. These obstacles are not dead ends — they are research challenges that require strategy, creativity, and patience.

The Brick Wall Methodology

Step 1: Recheck Your Work

Before pursuing new strategies, go back to basics:

- Have you searched all spelling variants of the name?
- Have you searched the name phonetically, not just literally?
- Have you searched all available census years, not just the obvious ones?
- Have you looked at neighboring counties and states?
- Have you checked for transcription errors in the index? (Try browsing the actual microfilm images rather than relying on the index)

Step 2: Exhaust All Relatives

When a direct ancestor cannot be found, research their siblings, cousins, and neighbors:

- A sibling's records may identify their parents by name
- A sibling who emigrated may have naturalization records that identify the place of origin more precisely
- A cousin's obituary may name all living family members
- DNA matches may connect to known descendants of collateral relatives

Step 3: Work Backward from Children

If you cannot find the parents in early records, start with the children in later records:

- Death certificates of the children may name the parents and their birthplaces
- Obituaries of the children may describe the family history
- Children's pension or military records may name parents
- Children's marriage records may list parents' names

Interpreting Negative Evidence

In genealogy, absence of evidence can itself be informative. If your ancestor does not appear in a particular record, ask why:

- They may have lived in a different jurisdiction than you assumed
- The record may have been lost or destroyed
- The record may exist but not yet be indexed or digitized
- They may have used a nickname, alias, or variant spelling consistently

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- They may have been systematically excluded (African Americans in many records, women in tax and voting records)
- They may have died before that record was created
- They may not have met the threshold to be included (too young, too poor, not yet a citizen)

Immigration Research Strategies

Tracing an immigrant ancestor back to their place of origin requires working from the American end toward the European (or other) origin:

- The 1900, 1910, and 1920 censuses record the year of immigration and the number of years in the U.S. — use these to bracket the immigration window
- Naturalization records (Declaration of Intention and Petition for Naturalization) often name the place of origin and sometimes the town of birth
- Passenger arrival records — especially post-1890 ship manifests, which list the town of last residence in the home country and the name of the nearest relative there
- Draft registration cards (WWI and WWII) often include birthplace
- Obituaries frequently name the hometown in the home country
- Church records in America may record the place of baptism in the home country

PRO TIP	Post-1906 ship manifests (available on Ancestry and FamilySearch) are among the most information-rich records in genealogy. They include the immigrant's last residence, who they were going to meet in America and that person's address, physical description, amount of money, and whether they had been to the U.S. before. These details can break open an entire research problem.

Using City Directories

City directories were published annually in most American cities from roughly 1850 to 1970. They list heads of household alphabetically with occupation and address. Their genealogical value includes:

- Tracking a family year by year between census counts
- Establishing presence in a city before they appear in census records
- Identifying the year a person's entry disappears (suggesting death or departure)
- Finding the year a widow begins to appear alone (establishing approximate death date of husband)
- Identifying occupations and employers
- Confirming identity when common names are a problem

Using Land Records

Land records often survive when other records do not, and they can reveal family structure in remarkable ways:

- Deed grantee/grantor indexes: Search for your ancestor as both buyer and seller

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- When a man died, his widow and heirs often sold the land. The deed of sale often names all the heirs and their spouses — a complete listing of the family
- Adjoining landowners in deed descriptions are frequently relatives
- Bounty land warrants (for military service) created a paper trail tracing men from service to settlement
- Homestead applications include the claimant’s personal history and sometimes family information

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STEP 8 Historical Context and Understanding Your Ancestors

Facts without context are just data. To truly understand your ancestors, you must understand the world they lived in — the forces that shaped their decisions, the constraints that limited their choices, and the events that defined their era.

Migration Patterns in American History

American families rarely stayed in one place. Understanding the major migration streams helps you predict where families may have gone:

- The Great Migration (1916–1970): Millions of African Americans moved from the rural South to Northern cities seeking industrial work and freedom from Jim Crow laws
- The Scots-Irish migration: Scots-Irish settlers typically moved south and west down the Appalachian valleys, from Pennsylvania through Virginia, the Carolinas, and into Kentucky and Tennessee
- New England expansion: Families spread west from New England into upstate New York and then into Ohio, Indiana, and beyond
- Southern migration to Texas and Arkansas: Families from Virginia and the Carolinas followed land-seeking routes through Tennessee and into the Deep South
- European immigration: Major waves from Germany and Ireland (1840s–1890s), then Southern and Eastern Europe (1880s–1924), followed by Latin America and Asia in later decades

PRO TIP	When a family disappears from their home county between census years, don't search randomly. Research the typical migration streams from that region. Families rarely moved at random — they followed family, church communities, ethnic networks, and economic opportunity along well-established routes.

Understanding Historical Occupations

Old occupational terms can be confusing. Here is a quick reference for terms commonly encountered in genealogical records:

Historical Term	Modern Meaning
Yeoman	A free farmer who owned and worked his own land (not a tenant)
Husbandman	A farmer, usually tenant or small-holding; below yeoman status
Planter	A farmer (in colonial America); in the South, often a large landowner
Factor	An agent or merchant who buys and sells on commission
Cordwainer	A shoemaker who works with new leather (distinct from cobbler, who repairs)

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Blacksmith / Farrier	Blacksmith works iron generally; farrier specializes in horseshoes
Miller	Operates a grain mill
Draper	A cloth or fabric merchant
Hatter	Makes hats
Joiner	A skilled woodworker who makes furniture and interior fittings
Labourer / Laborer	An unskilled or semi-skilled worker for daily wages
Domestic / Servant	A live-in household worker
Agent	A business representative; can indicate many specific occupations

Wars and Their Genealogical Records

Military records are among the richest sources of personal information in genealogy. Each major conflict produced different record types:

Revolutionary War (1775–1783)

- Service records, pension files, and bounty land warrants (Fold3 and Ancestry)
- Pension files are especially valuable — they often include depositions describing the veteran's entire life

War of 1812

- Service records and pension files; index at Fold3
- Many pension files were destroyed in the 1836 Patent Office fire — file a request anyway, as some survived

Civil War (1861–1865)

- Union service records and pension files: massive and information-rich; many digitized on Fold3 and Ancestry
- Confederate service records: available for most states; pension records held by individual states, not NARA
- Compiled Military Service Records (CMSRs) give unit, rank, and dates of service
- Pension files include medical history, physical descriptions, and family information

World War I (1917–1918)

- Draft registration cards for virtually all men born 1872–1900: name, address, employer, physical description, birthplace, nearest relative
- Service records (many destroyed in the 1973 NARA fire, but some survive)

World War II (1941–1945)

- Draft registration cards: same high information value as WWI cards
- Enlistment records available through NARA
- Service records largely destroyed in 1973 fire; request through NARA's eVetRecs system

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STEP 9 African American Genealogy

Researching African American ancestry presents unique challenges and requires different strategies, particularly for families who were enslaved before the Civil War. The historical record was deliberately constructed in ways that excluded and dehumanized enslaved people. Finding them requires persistence, creativity, and a willingness to use every available resource.

The 1870 Census: The Starting Line

For most African American families whose ancestors were enslaved, the 1870 federal census is the critical starting point — the first census to name all persons regardless of race. From 1870, work forward to build the family's modern history, then work backward toward the antebellum period.

KEY STRATEGY

Search for your African American ancestors in 1870, then in 1880. Compare the households.
Note every surname in the neighborhood — former enslaved people often settled near their
former enslavers and near other formerly enslaved families they had known. These surnames
are your research leads for identifying who held them before the war.

Freedmen's Bureau Records

The Bureau of Refugees, Freedmen, and Abandoned Lands (1865–1872) generated an enormous volume of records that are among the most important for African American genealogy:

- Labor contracts: Often name formerly enslaved adults and sometimes their family members
- Marriage records: The Bureau encouraged and recorded legal marriages. These often name the county or former enslaver where the couple had lived before freedom.
- Ration records, claims, and registers
- Letters and statements by freedpeople — some of extraordinary personal detail

FamilySearch has digitized and indexed a large portion of Freedmen's Bureau records. Access them at familysearch.org.

Identifying the Enslaver

The key to tracing ancestry before 1870 is usually identifying who held your ancestor in slavery. Strategies include:

- The surname your ancestor used after emancipation may be the enslaver's surname (but not always)

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- In the 1880 census, look for an elderly African American listed as 'mother-in-law' or in an adjacent household — she may have been enslaved by the same person
- Compare your 1870 and 1880 families with the 1860 and 1850 slave schedules of white families in the same area. Match demographics (age, sex) of enslaved people listed with your family members.
- Freedmen's Bureau labor contracts often name specific persons and the plantation or farm
- Estate records and wills of the enslaver may name enslaved people, especially those given as bequests or listed in inventories
- Plantation records, if they survive, can be extraordinarily detailed. Check the Library of Congress, state archives, and university special collections.

Additional Resources for African American Research

- African American Heritage: A State-by-State Directory of Collections (NARA publication)
- The African American National Biography (comprehensive biographical reference)
- Afro-American Historical and Genealogical Society (AAHGS): aahgs.org
- The Portal to Texas History: texashistory.unt.edu (strong African American collections)
- DigitalNC and other state digital library portals
- HBCUs often hold significant archival collections related to African American communities
- Local African American churches may hold records predating the Civil War

REMEMBER	The stories of enslaved ancestors are essential, deeply meaningful, and worth every effort to recover. The research path is harder, but the reward — restoring names, families, and humanity to people the historical record tried to erase — is profound.

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STEP 10 Writing and Sharing Your Family History

Genealogy is not just about collecting facts — it is about telling the story of human lives. All your research, ultimately, serves this purpose: to bring the people of the past back into presence, to honor their struggles and achievements, and to pass their stories to the next generation.

From Research to Narrative

There are multiple ways to share your family history, from simple pedigree charts to richly written family histories. Consider which format best serves your audience and your material:

Genealogy Software Trees

Online trees (Ancestry, FamilySearch, MyHeritage) allow you to share a structured family tree with documentation attached to each person. These are excellent for collaboration and reference, but they present data rather than stories.

Written Family Histories

A written family history goes beyond data to interpretation, context, and narrative. The best family histories:

- Tell the story of each generation in the context of the historical events they lived through
- Include direct quotes from letters, diaries, and interviews wherever possible
- Acknowledge what is unknown or uncertain honestly
- Include photographs, document images, and maps
- Are organized in a way that serves the reader, not just the researcher

Family Group Sheets and Ahnentafel Numbering

If you prefer a more structured format, the Ahnentafel numbering system is the standard for genealogical publication. The subject is #1; father is #2, mother is #3; each person's father is double their number, mother is double plus one. This allows precise citation of any ancestor.

Documenting Your Sources

Any family history you share should clearly document its sources. Future generations will want to know not just the conclusions, but how you reached them. For each fact, note:

- The source (document title, repository, collection name)
- The date of the record and the date you accessed it
- What the record says (and what it does not say)
- Your interpretation and reasoning

PRO TIP

Evidence Explained by Elizabeth Shown Mills is the definitive citation guide for genealogical research. It covers citation format for virtually every type of genealogical record. Proper sourcing separates credible genealogy from

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family legend.

Sharing and Archiving

Once you have written your family history, think carefully about preservation and sharing:

- Print and bind copies for close family members
- Deposit a copy at your county public library, historical society, and state library
- Share with genealogical societies that may have interest in the families you have researched
- Upload digital copies to FamilySearch or Archive.org for long-term open access
- Create a digital archive of all your scanned documents, organized and backed up in multiple locations

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A Final Word

Genealogy is one of the most deeply human things a person can do. It is a form of love extended backward through time — a refusal to let the people who made us possible disappear entirely into silence.

You will encounter frustrations: records destroyed, names changed beyond recognition, ancestors who seem to have appeared from nowhere. But you will also experience the particular joy that only genealogical research can provide: the moment a name resolves into a person, the discovery of a connection that rewrites everything you thought you knew, the recognition of yourself in someone who lived two hundred years ago.

Every family — yours included — is a story worth telling. The people in your tree were not background characters in history. They were the protagonists of their own lives, facing choices and challenges as consequential to them as yours are to you.

Start with a name. Ask a question. Write it down.

The story is waiting to be found.

From Sharon Virts Books

Many of the characters in **Masque of Honor, Bargains of Fate** (June 2026), **Swamp of Lies** (2027) and all the books in the **Fields of Honor** series were shaped through genealogical research exactly like this — uncovering relationships, patterns, and lived experiences hidden in the past.

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Quick Reference Appendix

Genealogical Research Checklist

Use this checklist for each new ancestor you research:

1. Collect all known family information from living relatives
2. Check all census records (1790–1950) for the ancestor and their household
3. Search state and federal vital records (birth, marriage, death)
4. Review probate records (will, administration, guardianship)
5. Check land records (deeds, grants, tax lists)
6. Review military records if applicable
7. Search city directories and local histories
8. Check church records and cemetery records
9. Search newspaper archives for obituaries and announcements
10. Research all siblings and collateral relatives
11. Document all sources and negative searches
12. Review DNA matches for connections

Common Historical Medical Terms

Historical Term	Modern Equivalent
Consumption / Phthisis	Tuberculosis (TB)
Dropsy	Edema; often indicates heart, kidney, or liver failure
Putrid fever / Jail fever	Typhus
Slow fever / Enteric fever	Typhoid fever
Flux / Bloody flux	Dysentery
Chin cough / Whooping cough	Pertussis
King’s evil / Scrofula	Tuberculosis of the lymph nodes
Apoplexy	Stroke
Palsy	Paralysis; often stroke-related
Teething	Infant death from many causes; often gastrointestinal infection
Marasmus	Severe malnutrition in infants
Childbed fever / Puerperal fever	Infection following childbirth
Fits / Convulsions	Seizures; may indicate epilepsy, high fever, or other causes

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Milk sickness	Trembles; caused by drinking milk from cows that ate white snakeroot

Key Genealogical Websites at a Glance

Website	Primary Use
ancestry.com	U.S. census, vital records, DNA testing, immigration records
familysearch.org	Free global records, U.S. census, international church records
findagrave.com	Cemetery records, gravestone photos, obituaries
fold3.com	U.S. military records, pension files, Civil War records
newspapers.com	Historical newspapers, obituaries, local announcements
findmypast.com	British Isles, Ireland, Australia, Canada
myheritage.com	European records, DNA testing, photo tools
dnapainter.com	DNA analysis tools, shared cM calculator
gedmatch.com	Cross-platform DNA matching and analysis
usgenWeb.org	Free county-level genealogical resources
cyndislist.com	Directory of 330,000+ genealogy links
archives.gov	National Archives; military records, immigration, census

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