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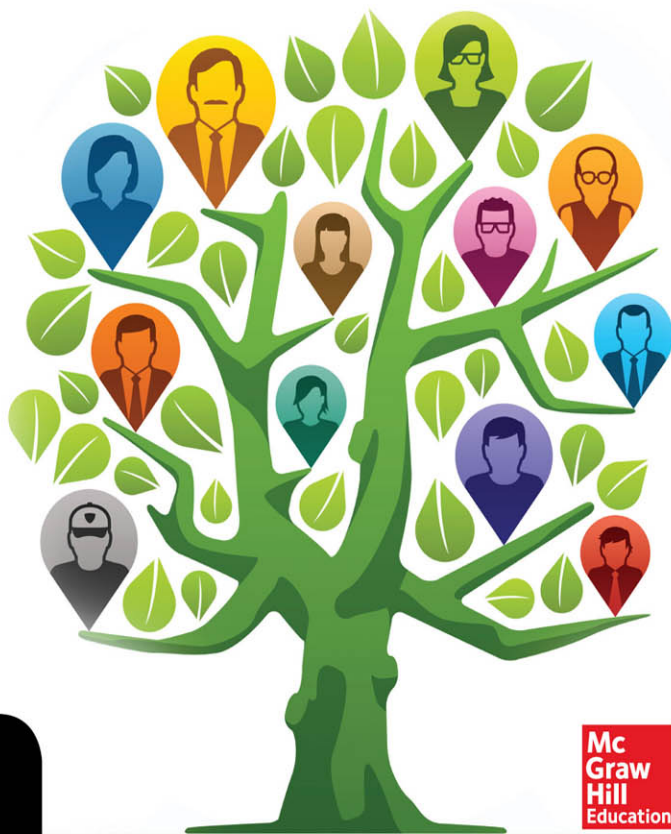
Genealogy

Fourth Edition

Use traditional and online
research strategies

Work with the latest tools,
including DNA records, social
media, and mobile apps

Access global resources
from the U.S., U.K., Ireland,
Canada, and Australia



George G. Morgan

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Hill
Education

*How to Do
Everything™*

Genealogy

Fourth Edition

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*How to Do
Everything™*

Genealogy

Fourth Edition

George G. Morgan

**Mc
Graw
Hill**
Education

New York Chicago San Francisco
Athens London Madrid Mexico City
Milan New Delhi Singapore Sydney Toronto

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This book is dedicated to the memory of my cousin,
Penny Frank Hahn
(1945-2014)



(Courtesy Dez Merrow Photography)

About the Author

George G. Morgan (Odessa, FL) is president of Aha! Seminars, Inc., and is recognized as a genealogical expert. He is a popular speaker at genealogical conferences across the United States at national, state, and local conferences, as well as in Canada and the United Kingdom, and on genealogical cruises. His range of genealogical interests and speaking topics is among the most diverse among the genealogical speaking community.

George is the prolific author of eleven previous landmark genealogy books, including *The Official Guide to Ancestry.com*, *Genealogical Research in the Major Repositories of London*, and the best-selling *Advanced Genealogy Research Techniques* written with co-author Drew Smith. He writes regular columns for the *Association of Professional Genealogists Quarterly* and *Family Tree Magazine*, his articles are regularly featured in *Family Chronicle* and *Internet Genealogy*, and his articles and columns have appeared in magazines and at websites in the United States, the United Kingdom, Canada, China, and Singapore.

George also delivers webinars for expanding eager audiences of genealogists and librarians who crave instructional materials to help them locate records, understand their content, evaluate information, and integrate this all into the context of their ancestors' lives.

About the Technical Editor

Drew Smith, MLS, has been a librarian at the University of South Florida (USF) Tampa Library since 2007, and was previously an instructor for the USF School of Library and Information Science (now the School of Information). He is a respected and popular speaker at local, state, and national conferences. He has written numerous articles for genealogical magazines, and is currently the "Rootsmithing with Technology" columnist for the Federation of Genealogical Societies' *FORUM* magazine. Drew is the author of the book *Social Networking for Genealogists*, published in 2009 by Genealogical Publishing Company. In 2013 he was selected to serve as the first Chair of the Family History Information Standards Organisation (FHISO). Since 2007 Drew has been the President of the Florida Genealogical Society of Tampa. He is a past Director of the Federation of Genealogical Societies and a past Secretary of the Association of Professional Genealogists (APG).

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

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Preface

This is a golden age for conducting our family history investigations. It is important that genealogical exploration include *both* traditional *and* electronic research. We still need to visit or work with physical facilities such as libraries, archives, courthouses, and other locations because only a small percentage of documents are on the Internet. However, the technology to assist genealogists is growing faster than ever. Information, in the form of indexes and original documents digitized by the tens of millions, is being added to the Internet each month. Newspapers and city directories that were printed on fragile, non-archival paper stock are being scanned and electronically indexed at an astonishing rate. Billions of photographs, including vintage pictures from personal family collections, are also being digitized, labeled, and placed online at a variety of websites. Cemeteries are being canvassed and photographed by volunteers around the world and are being placed online.

I wrote the first edition of this book because I felt that no other introductory book about genealogy went into enough detail about getting started with your family history research and then progressed beyond the basics. Over the last decade, no other how-to genealogy book has been published with as much information and as many illustrative graphics as this book, and this fourth edition is no exception.

I always wanted a genealogy how-to book that addresses records in the United States, Canada, England, Wales, Scotland, Ireland, and Australia. This book provides that. Research in the primary English-speaking countries is essential, especially if you are trying to research backward and “cross the pond.” Understanding one type of record in one location can help you draw analogies in another location, therefore more quickly grasping the importance of the content and the contextual implications of a new record.

What This Book Covers

This new, fourth edition of the book continues the premise of providing a solid foundation for genealogical research. It also includes discussions of many different record types of genealogical importance created and available in English-speaking countries, the physical repositories and/or online resource facilities where they may be found and accessed, and a wealth of logical research methodologies. The figures and tables throughout complement the text, providing samples and details for your future reference.

Genetic genealogy research has rapidly evolved since the third edition, and this book reflects the most recent testing that is available, and discusses tools and references for getting the most of your genetic genealogical results. It also includes up-to-date information about social media, which has become an important part of the collaboration between genealogists.

New to this edition is an up-to-the-minute discussion of a number of mobile genealogy apps for the iPhone and Android operating systems. These are in addition to the mobile apps available for many of the genealogical database software programs that run on desktop, laptop, and tablet computers.

Regardless of your experience and expertise, I know that you will find something helpful at the turn of every page in the book. Don't discount a particular concept or description presented. Instead, use the contents of the book as a structured review. You'll learn *or relearn* the basic rules of genealogical evidence and how to use your "critical thinking skills" to evaluate the source materials that you find. You will learn to look more deeply into basic record types, such as vital or civil records and censuses, and you will discover and understand other, more advanced record types that perhaps you have never used. You will undoubtedly encounter "brick walls" that may stymie your research. Yes, they can be frustrating, but they don't have to bring your research to a standstill. When you reach an impasse, return to the chapter(s) that includes information about records that are likely to provide you with answers. Alternate record types are nearly always available to provide another source of information. You may also find help to circumnavigate your brick walls in the book, *Advanced Genealogy Research Techniques* (McGraw-Hill, 2013), which I wrote with my partner Drew Smith. In it we explore many ways of approaching daunting research problems.

You are embarking on a fascinating genealogical research odyssey that may last the rest of your life. Along the way you will meet many wonderful people and visit some fascinating places. You also will come to know your ancestors and their families as real people—and as close personal friends. It is my fervent hope that your research will be successful and that your family tree will prove to be a fruitful source of information to help you better understand your family origins. I also hope that you will share the stories with your family, friends, and other genealogists. I know from more than 50 years of personal experience that you'll have an exciting and gratifying journey. I continue to learn something new each and every day, and I know that you will too.

Happy hunting!
George G. Morgan

Acknowledgments

Every book is a labor of love, but it also is hard work. A book about genealogy certainly involves complicated research, analysis and descriptions of materials, and discussions of successful research methodologies. The author also must rely on other people in order to bring the book to fruition. I would be remiss if I didn't extend my sincere thanks to the generous people who helped me on many levels.

This is my fifth book for McGraw-Hill. The publication team could not have been more helpful, supportive, and professional in every way. I first want to thank Roger Stewart, editorial director at McGraw-Hill Professional, for his friendly counsel throughout the writing and production process. His intelligence and wit have helped to inspire me. Amanda Russell is the editorial coordinator who has juggled the details and cheerfully answered so many of my questions.

Janet Walden is the editorial supervisor who efficiently reviewed and coordinated the editing of my manuscript. She certainly helped smooth the final product.

Drew Smith has been the technical editor for all four additions of this book. His meticulous attention to the technical details has been wonderful. He has helped ensure that the URLs included are correct and current. Furthermore, I have to thank him for his help with the chapter on DNA for genealogy. He is an expert, and I keep learning more from him every day.

I want to thank Bill McManus, the copy editor who has worked on the second, third, and fourth editions of this book. That continuity, his great editorial skills, and the very logical questions he has posed throughout the process have resulted in a more highly polished book.

I also want to thank the following people for sharing documents, photographs, and images for use in the book: Susan Jones, Peter Frank, Lourdes Sanchez Merrow, Karen Roth, Drew Smith, and Jeff Smith. Their contributions are great complementary materials for the book. Thanks to Ed Zapletal at Moorshead Magazines, Ltd., for allowing me to include the material I had written about the Genealogical Proof Standard in the book. Thanks to Diane Haddad at *Family Tree Magazine* for allowing the use of their great genealogy forms.

I would like to thank Drew, Karen, Penny, Peter, and Carey for their moral support through the writing process. And finally, a big thanks to my many, many genealogy friends around the world who so generously share their knowledge, experience, and warm support.

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PART I



Begin Your Family History Odyssey

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1

What Is Genealogy?

HOW TO...

- Understand the difference between genealogy and family history
- Assess what constitutes a family
- Consider the different motivations of genealogists
- Incorporate documentary hearsay, and genetic evidence

We live in fast-paced times and are inundated by information of all types. Our jobs and other influences often take us far away from where we were born and where our families may still live. Since geographic distances can impose communication breaks between us and other family members, it is normal for us to sometimes feel the need to know more about ourselves and to reconnect with the history of the people in our families and with the simpler times, places, and events in which they lived.

Genealogy is fast becoming one of the most popular hobbies in the English-speaking world. This is becoming more evident with the huge audience responses to recent television series such as *Who Do You Think You Are?* in the United States, the United Kingdom, and elsewhere, *Genealogy Roadshow*, *Faces of America*, and *Finding Your Roots* in the United States, and other genealogy-related television programs produced and broadcast elsewhere. Baby Boomers, as they reach retirement age, are finally finding the time to trace their family history and are becoming immersed in their research.

Understand the Difference Between Genealogy and Family History

Don't be intimidated by the term "genealogy." The word is derived from Latin and Greek and simply means the study of a line of descent. And genealogy is nothing new. The aristocrats in ancient China carefully documented their male family lines in genealogies referred to as *jia pu*. Egyptian royalty detailed their familial histories and relationships, and these are often documented in hieroglyphics carved into stone or on clay tablets or painted onto wet plaster (see Figure 1-1).



FIGURE 1-1 The Saqqara Tablet contains a list of Egyptian pharaohs. It was found in the tomb of a priest by the name of Tjenry, who lived during the reign of Ramesses II.

It was important for royalty and aristocratic families in Europe to document their family lines in order to determine the rights of succession and the validity of an heir to inherit. The terms *genealogy* and *family history* are often used interchangeably. While they may seem similar, there actually is a distinction between them:

- Genealogy is the scholarly study of a family's line of descent from its ancestors, during which one develops an understanding of the family's historical context and documents its history and traditions.
- Family history is the study of a family's history and traditions over an extended period of time and may involve documenting some or all of the facts.

A family historian may seek to trace and document specific family members or a branch of the family, and to perhaps write a family history. A genealogist, on the other hand, typically has a much broader view of the family. He or she traces an entire or extended family structure, including brothers, sisters, aunts, uncles, and cousins. This includes both their ancestors (the persons from whom they are descended) and their own descendants. The genealogist actively seeks documentary evidence of many types to prove and verify facts about the family. In addition, the genealogist seeks to place family members and ancestors into geographical, historical, and social context in order to better understand their lives. The genealogist also documents the sources of all the evidence he or she finds, using standard source citations.

In actuality, those of us who are eager to learn as much as possible about our families and our ancestors will combine both genealogy and family history research. This approach will provide us with detailed biographical information to actually bring these people's lives into focus.

Assess What Constitutes a Family

The simplest concept of a traditional nuclear family has been considered to include a father, a mother, and children. However, a modern family can consist of any number of combinations of individuals:

- A single parent and one or more children
- A stepparent and one or more children

- A grandparent and one or more children
- One or more grandparents, or a father-in-law or mother-in-law, living with the family
- An aunt or uncle, and perhaps cousins
- One or more foster parents
- A same-sex couple, perhaps with one or more either natural children or ones that the couple has adopted
- Any family unit with adoptees

As you can see, the living arrangements are many, and the interpersonal relationships between the people in a household can be complex. People don't always have to be related by blood to be components of a "family." However, these are still family groups that need to be represented, as they exist, and need to be documented as part of your family history.

Motivations for Genealogical Research

We *are* the product of our ancestry in many different ways. Certainly genetics play a critical part in our physical makeup, determining our physical characteristics and potential susceptibility to medical conditions, both physical and mental. However, the circumstances of place, time, physical environment, education, economics, experiences, family group dynamics, social influences, and interactions with the personalities of our family members and friends also distinctly influence our development. These other influences will all contribute to the overall person that we become. The family stories and traditions that we have observed and that have been passed from generation to generation contribute to our sense of kinship and belonging. It is no wonder that we want to explore, maintain, document, and preserve these stories and traditions. Documentary evidence is still the most significant resource used in genealogical research, but genetic genealogy has rapidly become another component in the genealogist's toolkit. We will examine and discuss all of these types of research evidence throughout the book.

Why are so many people interested in their family history? There are certainly many motivations for genealogical research. Here are the most common ones:

- **Create a sense of belonging** Some people trace their ancestry to help understand their place in the family.
- **Document family traditions** The term *family tradition* has multiple meanings for genealogists. In one sense, it refers to such things as why a particular holiday is celebrated, why certain foods are or are not eaten, or why members dressed in particular clothing or styles. Family tradition can also refer to family stories that are passed on from one family member to another. You might refer to these as the "family legends."

- **Join heritage or lineage societies** Some people study and document a family's direct line of descent in order to link to some famous group of people. Often this is done in order to join one or more of the lineage or heritage societies, such as the Daughters of the American Revolution, the General Society of Mayflower Descendants, or the First Fleet Fellowship.
- **Research ethnic origins** There is a great deal of interest in tracing the place of origin of a family line, the racial origins, or religious background.
- **Document medical history** Many people may research their family members' data for reasons such as to discover the family's medical history. This may help project possible longevity or provide clues to susceptibility to specific medical conditions that recur in a family line.
- **Locate heirs** Some people, including family members and legal professionals, perform research to trace living people who are descended from specific individuals. This may be done to reconnect family members or to trace individuals who may be entitled to inherit from an estate.
- **Locate birth parents** Adoptees frequently are interested in identifying and perhaps connecting with their birth parents. Adoption laws in some places seek to protect the identities of birth parents by preventing anyone from accessing original birth records without approval of a court of law.
- **Pursue paternity/maternity claims** Genealogical research, including genetic tests, is used to establish and document relationships between children and their birth father or mother. This may provide documentary proof for use in civil court cases.
- **Document ownership of property** There are many people who are interested in the history of their property or home. They may therefore perform genealogical research into land and property records, census documents, and other historical materials in order to determine the names and biographical information of the people who previously may have owned the property.
- **Conduct historical or social research** Scholars and historians often perform genealogical research in order to learn more about a particular area's historical background and the people who lived there.
- **Perform background research** Authors frequently investigate details about places and individuals living in a place at a particular time as background for their books or magazine articles. Writers and producers of video productions, particularly biographical and historical documentaries, perform background research in order to ensure that details are correct.

You can now begin to understand that there are many types of people who are doing research of a genealogical or family history nature. They are ordinary citizens of all ages, historians, sociologists, anthropologists and archaeologists, legal personnel and paralegals, land and property clerks, government officials, adoptees, and potential heirs. It also includes people like us who are interested in learning more about our ancestors and their places in history. Whatever *your* reasons for tracing and investigating your own family's history, your search will lead you on a fascinating and exciting journey of discovery. Don't be surprised if your quest lasts a lifetime.

Documentary, Hearsay, and Genetic Evidence

The term *evidence* is one we will discuss a great deal throughout the book. As a genealogist or family history researcher, you are always looking for details about individuals. These details can come in many forms. Human beings love to write about themselves, and their administrative governments delight in gathering statistical information. Paper records that were created at various times during our ancestors' lives, by both them *and* other people, constitute documentary evidence. They may include letters and notes, diaries, and other written materials written by your ancestors and their families or friends. They may also include more formal documents generated by government authorities for a wide variety of purposes. These might include census records, birth, marriage, or death documents, land and property documents, court records, wills and probate records, and many more. Figure 1-2 shows a marriage record from a county marriage book from 1866.

Hearsay evidence is that which is typically shared verbally between individuals. A prime example might be a family story passed from generation to generation. ("Family tradition has it that Grandfather Holder fought in the Civil War.") This type of evidence is typically considered much less reliable than other types because the facts can become distorted with the retelling of the story over time.

DNA testing has become an important part of the genealogical research process over the last decade. Its reliability in proving genetic familial relationships provides methods for confirming documentary evidence already collected or identifying matches with other related family members.

All of these types of evidence provide details about your ancestors and their lives. Some pieces of evidence are more reliable than others. In some cases, you will find that some information found on the Internet is reliable, but that other online information may be problematic in some respect. You will learn more in the coming chapters, however, about many different kinds of evidence and how to use your critical thinking skills to effectively evaluate them, so that they help build your knowledge of your family.

Now that you have a better understanding of what genealogy is, let's get started on our genealogical journey!

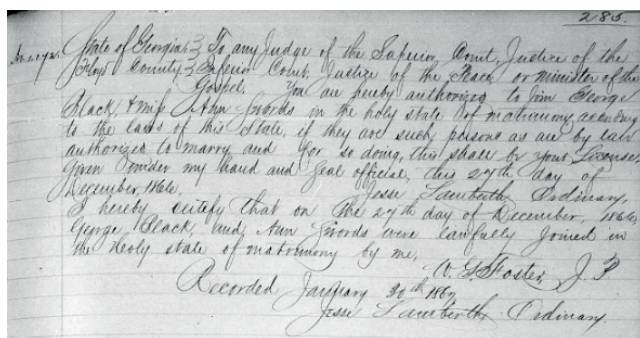


FIGURE 1-2 A marriage record from Floyd County, Georgia, documenting the matrimony between George Black and Ann Swords on 27 December 1866.

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2



How Do I Get Started?

HOW TO...

- Start at the beginning with yourself and work backward in time through your ancestors
- Discover sources of information in your own home
- Understand what types of records and materials can help you learn more
- Interview all your relatives
- Begin to organize what you find

Most people begin their family history odyssey in a very casual way. You may have seen a photograph or heard a story about some member of the family and found it interesting, and you wanted to learn more about that person or their immediate family. You probably asked more questions, or you began to seek more information in the form of letters and postcards, additional photographs, or some other type of material. Perhaps you even wrote down what you learned in some chronological order so that you could get a clearer understanding about the person or their family.

My own genealogical research began on a cold, snowy January day in my North Carolina hometown when I was nine years old. While snowfall was not unusual, a six-inch accumulation was rare indeed. There was no school scheduled for several days, and I spent the days at the home of my aunt, Mary Allen Morgan, and my grandmother, Minnie [*sic*, Laura Augusta] Morgan while my parents worked. Both women had a strong sense of family and history, especially my grandmother, who was 88 at the time. She was the daughter and granddaughter of prominent physicians in Mecklenburg County, North Carolina. She was also the great great granddaughter of two North Carolina Revolutionary War patriots. One of these was John McKnitt Alexander, the secretary of the group of citizens in Mecklenburg County who formed the provincial committee that crafted and signed the fabled Mecklenburg Declaration of Independence on 20 May 1775. The other was Major John Davidson, a Revolutionary War military leader after whose family Davidson College was named.