



A CURATED JOURNEY THROUGH GENERATIONS:

The Master Genealogist's Comprehensive Checklist

Every family tree is as original and unique as you are.

Core Identity & Vital Records

- ☐ Full legal name (inc. variations)
- ☐ Birth record (date, place, parents)
- ☐ Marriage records (spouse, location)
- ☐ Death record (date, cause)
- ☐ Burial/Cemetery information
- ☐ Baptism/Christening details
- ☐ Divorce records (decree, filings)
- ☐ Adoption or guardianship

Census, Residence & Migration

- ☐ federal, state, territorial
- ☐ occupations, addresses, neighbors
- ☐ ownership, transfers, neighbors
- ☐ property, personal taxes, poll taxes
- ☐ state-to-state, country-to-country
- ☐ ship manifests, naturalization
- ☐ WWI, WWII, Civil War, etc.

Legal, Court & Government Records

- ☐ Wills, probate & estate files
- ☐ Deeds, land grants & patents
- ☐ Court minutes & case files
- ☐ Tax rolls (federal, state, local)
- ☐ Military service & pension files

DNA & Genetic Connections

- ☐ Test results (autosomal, mtDNA)
- ☐ Match List (cM Chart)
- ☐ Segment maps
- ☐ Surname clusters
- ☐ Ethnicity estimates (context only)

Occupation, Skills & Daily Life

- ☐ Explore their trades, specialized skills, and professional certifications.
- ☐ Consult (unions, societies, employment files) for detailed research.

Research Notes

- ☐ Research log (all searches)
- ☐ Source citations (full, repeatable)
- ☐ To-do list (next steps, gaps)

Historical & Cultural Context

- ☐ Local history timelines
- ☐ Maps of the era (county boundaries)
- ☐ Occupational context
- ☐ Ethnic or cultural traditions
- ☐ Community roles

Storytelling & Legacy

- ☐ Record family histories (oral or written)
- ☐ Preserve copies (original/digital)
- ☐ Biographical sketches
- ☐ Ancestor timelines
- ☐ Migration maps (visual story)
- ☐ Family traditions
- ☐ Oral histories (interviews)
- ☐ Photo captions (who, where)

Don't Forget to Check

- ☐ Newspaper mentioned (obits/ads/etc)
- ☐ Photos (dated/labeled)
- ☐ Family Bibles
- ☐ School (yearbooks)
- ☐ Church Records

Preserve & Organize

- ☐ Create a detailed timeline of ancestors
- ☐ Digitize and organize
- ☐ Acquire high-resolution
- ☐ Establish comprehensive backup protocols
- ☐ Standardize metadata

A Legacy Charted in Fact and Story for Generations to Come
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