

Informed Consent and Client Preferences for Search for Family Members (*sample template*)

The following template is customizable and may be used as a guide. The two main purposes of this agreement are to determine the client's preferences to set up their case, and obtain informed consent from the client. This document does not constitute legal advice. Consult an attorney for legal advice. Please contact Mckell Keeney with any comments or suggestions on this template: mckell11@gmail.com

PERSONAL INFORMATION

Name:

Cell phone:

Email:

Home address:

Birthdate:

Birth location:

Adoption agency, if any?:

- I am an adoptee. I am donor-conceived. I am a foundling.
 I have unknown or misattributed parentage. Bio-father Birth mother

I am searching for my birth mother my birth father my sibling(s)
 other (Please specify):

My goals for finding family member(s) are:

- Obtaining family medical history
 Seeing photos of close relatives
 Seeing photos of, and/or reading stories about, more distant ancestors
 Contact with, or meeting close relative(s)
 Other _____ (Realize your goals might change during the search.)

I will email (Search Angel) any paperwork, certificates or information I have related to my birth, adoption or to my family mystery, and write down and send any oral lore or clues I have heard about my adoption or family mystery. Email to: (_____)

I am in the following adoption search registries: ISRR gsadoptionregistry
 State-specific registry Other (please specify):

SEARCH BASICS

- I understand that because I am an adoptee (or have unknown parentage), there is no charge by (Search Angel) for her service and research hours to work on my case. A Search Angel is, by definition, a volunteer who helps adoptees.
- I have another Search Angel or company working on my case (Name and contact information to see about possible collaboration): _____
- If I engage another Search Angel or company to work on my case, I will let (Search Angel) know so work is not duplicated.
- I understand that (Search Angel) has more than one case at the same time, and that having all the items on this list in place will allow (Search Angel) to more efficiently and effectively work on my case.
- I understand that sometimes there may be a lag in the case until new matches come in for me, or another break in the case occurs.
- I understand that no guarantee is made by (Search Angel) that the case can be solved in any particular amount of time. All efforts will be made to solve the case as quickly as possible.
- I understand the length of time to solve the case depends on how close my current DNA matches are on the sites, and other factors.
- I understand that genealogical research and research of DNA results can uncover surprises or family secrets that are not part of the original research question.
- I agree to participate in the search to the extent that I am able.
- I am aware that sometimes it is best not to say on my profile(s) that I am adopted, or to volunteer that information on first contact when responding to DNA matches and contacting DNA matches.
- I will check daily for new matches on Ancestry and/or 23andMe who are predicted 3rd cousins or closer and let (Search Angel) know if there are any.
- I will check daily on GEDmatch, MyHeritage and Family Tree DNA for new matches that are 90 centiMorgans or higher and let (Search Angel) know if there are any.
- I prefer that (Search Angel) check for new matches on the sites to which she has access. I understand that she cannot check all of them every day.

DNA INFORMATION

I tested at

- Ancestry
- 23andMe
- Family Tree DNA
- MyHeritage
- Living DNA
- Other (Please specify):

I will test at (or upload my results to) Family Tree DNA (read terms of service first).

I will test at (or upload my results to) MyHeritage (read terms of service first).

I will upload my results to GEDmatch (read terms of service first).

I will unlock the chromosome browser on Family Tree DNA (if I did not test there).
Click chromosome browser on your home page or Family Finder page.

I will link my Ancestry DNA test to myself in my Ancestry tree. (From “Your DNA Results Summary” page, go to the Settings gearwheel, then to Family Tree Linking.)

I will invite (Search Angel) to be a Collaborator on my Ancestry DNA results (From “Your DNA Results Summary” page, go to the Settings gearwheel, and scroll down to DNA Ethnicity and Matches Access.)

(Search Angel) may access my DNA results to search on my behalf, and make notes for my top DNA matches (3rd cousins and closer, and some 4th cousins).

ANCESTRY TREE INFORMATION

I have, or will create, a private and unsearchable research tree on Ancestry and give (Search Angel) a role as Editor. (Or, if I have a current Ancestry “biological” tree that is not private, I will change it to private and unsearchable.)

I understand that (Search Angel) will be adding to my research/speculative tree, and that some of the people will be hypothetical at first in certain spots in the research/speculative tree. (Search Angel) may move these people around until they are in the correct spots in my tree, as they are related to me.

I agree not to delete my tree without letting (Search Angel) know first. (Many hours go into building a client’s research tree and the people in the tree are your relatives, one way or another.)

PERMISSIONS

If surprises are found in the DNA matches or sources, such as a close family member other than the one(s) I am seeking, I wish to be notified.

I understand that for (Search Angel) to view and use my DNA results on 23andMe and on Family Tree DNA, I must give her my login information. I give her permission to check my DNA results on 23andMe and on Family Tree DNA. When the case is closed, I will change my passwords. If I change my passwords before then, I will let (Search Angel) know they have been changed.

I will call (Search Angel) or send my login for 23andMe and for Family Tree DNA.

I need help downloading my DNA file and uploading it, and I give (Search Angel) permission to download it from _____, and upload it to

GEDmatch MyHeritage and Family Tree DNA. I will read "Terms of Service."

I would like my name listed as _____ on any sites where (Search Angel) uploads my file. (Search Angel recommends that you use two initials with no numbers, or a pseudonym you haven't used anywhere else, unless you prefer your name.)

I give (Search Angel) permission to use my results at third-party websites or apps with tools for DNA to aid in the search.

Please check with me before using my results on any third-party websites or apps with tools for DNA to aid in the search.

I would like to be the one to call or write immediate family members. (Recommended)

I have difficulty contacting people. I ask that (Search Angel) be the one to make contact with immediate family members, after checking with me first.

I give permission for my story to be used in one of (Search Angel's) future blog posts or presentations with the names and locations of living people changed for privacy.

I reserve the right to review my story before it is posted or shared.

If I change my mind on any of these items, I will let (Search Angel) know in writing and sign a new agreement.

Signed: _____, Client (An electronic signature is acceptable) Date: _____

This section is for the Search Angel:

(Search Angel) agrees to look at the client's DNA results and at the client's family tree, if any.

(Search Angel) agrees to take this case and work on solving it.

(Search Angel) will use discretion if discussing the case with others who may be of assistance.

(Search Angel) will pass on important updates to the client upon receiving them.

(Search Angel) will let the client know if she is unable to continue working on the case.