

Research Plan Checklist

[Video Link](#)

When I first started out in genealogy, I wanted a checklist. I guess I'm a checklist kind of person. So here I've created a list of types of records to look for when researching each ancestor. This is a "suggested" list of what to look for, not necessarily where to find them. There is no list in the world that could possibly list everything, but these are common items we would seek when researching our family history. THIS IS NOT EVERYTHING... feel free to add to it. Use this as fuel for thought.

Use this checklist as a quick research plan to help get you started for each ancestor you're researching (what I call your Target Ancestor). You can use this over and over again for each Target Ancestor.

Ancestors Name: _____

Wills & Probate

- Wills
- Probate Packet
- Court Documents of Settlement

Census

- Federal/National Census Records
- State/District Census
- Agricultural
- Slave Schedules
- Mortality Schedules

Immigration, Emigration, and Naturalization

- Ship Manifests
- Immigration (arriving) Records
- Emigration (leaving) Records
- Migration Histories
- Newspapers

Civil Vital Records

- Birth Certificate & Delayed Birth Certificates
- Marriage Certificates, Bonds, Banns, Intent to Marry
- Death Certificates & Delayed or Modified Certificates



Land

- Deeds (may be multiple land records)
- Maps

Church Records

- Birth Registries
- Marriage Registries
- Baptismal/Christening
- Burial Records
- Cemeteries

Directories

- City Directories & Phone Books
- Church Directories

Court

- Estate Settlement
- Child Custody
- Criminal
- Civil
- Adoption

Newspapers

- Obituaries
- Accomplishments (i.e. civic organizations, student achievements. Etc.)
- Social Page
- Business Ads
- Marriage Announcements
- Military
- Birth Announcements

Cemeteries

- City Owned
- Privately Property
- County Owned
- Company Owned
- Funeral Homes

Local Histories

- Seek Local History
- Surrounding County History

Manuscripts

- Self-Published Family Histories
- Published Family Histories

Military

- What Branch (Army, Navy, Marines, Coast Guard, Airforce, etc.)
- When & Where did they serve?
- Any military conflicts?
- Pension Files
- Widow's Claims
- Burial & Cemetery

National Archives

- Census (Population, Agricultural, Slave Schedules, Mortality Schedules)
- Census Maps
- Various Registries
- Histories
- Maps!
- Images
- Video

State Archives

- Land
- Military
- Wills & Probate
- Genealogies (might be in state library)
- Maps!
- Images
- Video

Personal Archives

- Family Bibles
- Adoption Papers
- Vital Records
- Scrapbooks
- Photo Albums
- Videos/Audio Recordings

Maps

- Federal
- State
- Local Libraries
- Military

- Migration Routes
- Gazetteers
- Postal Maps
- Census Maps
- Land & Plat Maps
- Fire Insurance Maps

Occupation

- City Directories
- Trade Associations
- Unions
- Newspapers

School

- Yearbooks
- Family Saved Report Cards
- Honor Rolls

Tax Records

- Tax Lists
- Poll Taxes
- Agricultural Records
- Property Taxes

Correctional Institutions

- Prison Records (Federal, State, or County)
- Court Documents

Histories

- Online at National, State, and Local Archives/Libraries
- Personal Websites
- Histories of surrounding counties
- County border changes.

Family Histories

- State Libraries
- State Genealogical Societies
- Local Libraries
- Online Platforms (all of them)
- Family Bibles
- Family Artifacts