

Ethical Genealogy

A GUIDE TO RESPONSIBLE RESEARCH

Thoughtful tools for organizing what matters.

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Introduction

Family history connects us to people, past and present. The choices we make while researching and sharing their stories can affect privacy, trust, and how those stories are understood.

This guide offers four principles for thoughtful research: Protect People, Research Honestly, Respect Contributions, and Share Responsibly. Whether you are beginning your first family tree or revisiting years of research, use them to pause, ask useful questions, and make considered decisions.

The guidance reflects ethical practices rather than a complete statement of legal requirements. It cannot anticipate every circumstance, but it can help you approach the people and materials you encounter with care.

Chapter 1: Protect People

Every family history belongs to real people, each deserving of privacy, dignity, and respect.

1.1 Privacy of Living Individuals

Family history research connects us to generations past, but it also involves people living today. Their privacy deserves the same care and consideration we would want for ourselves.

- Information about living individuals should be treated as private unless they have knowingly agreed to its **use and/or disclosure**.
- Even seemingly harmless details, such as a name or family relationship, may reveal more than someone wishes to share.
- Genealogy websites and software often provide privacy settings for living individuals. Take advantage of these protections, and review what others can see before publishing or sharing a family tree.
- Information being publicly available does not necessarily mean it is appropriate to reproduce or share it.

A thoughtful researcher protects the privacy of living people while preserving the history of those who came before them.

1.2 Consent and Confidentiality

Consent is more than simply receiving permission. It means ensuring that someone understands how their information, photographs, stories, or other contributions may be used and shared. Confidentiality means honoring the trust placed in us when that information is provided.

- **Ask before sharing.** When someone provides personal information, family stories, photographs, or documents, clarify whether they are comfortable with those materials being shared, published, or used in further research.

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- **Be specific about permission.** Consent to include information in a private family tree does not automatically extend to publishing it online or sharing it with others.
- **Respect confidentiality.** If someone shares information privately or requests that certain details remain confidential, honor those wishes, even when the information might help solve a research mystery.
- **Recognize that permission can change.** Someone who was initially comfortable sharing may later reconsider. Respect updated wishes and make reasonable efforts to adjust information already shared.
- **Protect information entrusted to you.** Store private records and correspondence carefully, and consider who may have access to them, including through shared accounts, online trees, and cloud storage.
- **Before sharing something entrusted to you, consider how you would feel if your own photographs, stories, or personal information were shared without your knowledge or permission. Extend that same consideration to others.**

1.3 DNA Privacy and Unexpected Discoveries

DNA testing has opened remarkable opportunities for family history research. It can connect relatives, confirm relationships, and reveal family connections that traditional records alone may never uncover. However, genetic discoveries can also affect people who never chose to participate in the research.

- **Remember that DNA is shared.** Your genetic information may reveal clues about parents, siblings, children, and other relatives. Consider how sharing your results could affect them.
- **Obtain permission before using someone else's DNA.** Obtain their informed permission before arranging a test or uploading their results to another service. Explain the intended use and relevant sharing settings.
- **Respect the privacy of DNA matches.** A person who participates in DNA testing has not necessarily agreed to have their identity, results, or family relationships shared publicly.
- **Approach unexpected discoveries with sensitivity.** DNA results may reveal previously unknown relatives, adoption, unexpected parentage, or long-held family secrets. These discoveries can carry emotional consequences for everyone involved.
- **Distinguish evidence from conclusions.** A DNA match can support a biological connection, but identifying the exact relationship or common ancestor often requires additional research and supporting records.
- **Honor personal boundaries.** Some individuals welcome new family connections; others may prefer not to explore them. Respect their choices without judgment or pressure.
- **Consider future consequences.** Before publishing genetic findings or sharing sensitive discoveries, think about how the information might affect individuals and families now and in the years ahead.
- **Understand your testing company's policies.** Before submitting DNA or sharing results, review the company's privacy settings, data-sharing practices, and policies regarding law enforcement access. Understand what choices are available and how to change your preferences.

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1.4 Sensitive Family Histories

Every family has stories that are difficult to tell. Research may uncover adoption, estrangement, family conflict, criminal histories, or circumstances that earlier generations chose not to discuss. These discoveries are part of family history, but they deserve to be approached with care, compassion, and respect for the people involved.

- **Consider the people behind the records.** Historical documents may describe painful events without explaining the circumstances surrounding them. Avoid assumptions or judgments based on incomplete information.
- **Separate discovery from disclosure.** Finding sensitive information does not mean it must immediately be shared. Consider who might be affected, whether the information is reliable, and whether sharing it serves a meaningful purpose.
- **Respect differing perspectives.** Family members may remember the same event differently or have different feelings about discussing it. Listen respectfully, even when their accounts disagree.
- **Be mindful of historical context.** Social expectations, laws, and cultural traditions change over time. Understanding the circumstances of an earlier generation can help us interpret their experiences more fairly.
- **Preserve without sensationalizing.** Difficult events can be documented accurately without unnecessary speculation, dramatic language, or judgment.
- **Recognize personal boundaries.** Some relatives may welcome conversations about difficult family history, while others may not wish to participate. Respect their decisions.
- **Let the evidence speak.** Document what reliable sources establish without inventing motives, filling gaps with assumptions, or presenting unverified claims as fact. Difficult truths deserve neither embellishment nor concealment.

1.5 Contacting Living Relatives: Leave the Door Open

Genealogy can lead us to living relatives we never knew existed. Reaching out may open the door to meaningful connections, shared memories, and new discoveries. However, a shared family connection does not create an obligation to communicate or establish a relationship.

- **Make your introduction respectful.** Explain who you are, why you are reaching out, and how you believe you may be connected. Keep your initial message friendly, brief, and free of pressure.
- **Allow people to decide whether to respond.** An unanswered message is not an invitation to keep trying. Give the person space to respond in their own time, or not at all.
- **Respect a refusal.** If someone indicates that they do not wish to communicate, honor that decision. Do not attempt to reach them through other accounts, family members, or intermediaries.
- **Use intermediaries thoughtfully.** When communication occurs through another person, respect the boundaries conveyed. Do not assume that an intermediary can grant permission on someone's behalf.

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- **Be considerate when discussing sensitive connections.** An unexpected message about adoption, unknown parentage, or another family discovery may be unsettling. Avoid revealing sensitive details in an initial contact or making assumptions about what the recipient already knows.
- **Leave the choice with them.** If someone declines contact, a simple acknowledgment of their wishes is enough. Where appropriate, you may let them know that they are welcome to initiate contact in the future, without expecting a response.

1.6 Cultural and Community Respect

Family history research often crosses cultural, religious, and community boundaries. Traditions surrounding ancestry, identity, family relationships, and the sharing of historical knowledge can differ significantly. Thoughtful researchers recognize that their own perspectives and practices may not be shared by everyone they encounter.

- **Approach unfamiliar traditions with curiosity and respect.** Take time to understand cultural practices and beliefs rather than interpreting them solely through your own experiences.
- **Respect community knowledge and boundaries.** Some histories, ceremonies, records, or family traditions may be considered private or intended only for particular individuals or communities. It may not be appropriate to collect or publish such information without understanding those boundaries.
- **Be thoughtful when identifying cultural connections.** It may not be appropriate to assign cultural, ethnic, religious, or community identities based solely on surnames, locations, DNA estimates, or family assumptions.
- **Listen to those connected to the history.** When researching communities or traditions outside your own experience, seek reliable perspectives from people knowledgeable about that history. Recognize that no single individual necessarily speaks for an entire community.
- **Consider historical context.** Names, identities, relationships, and community boundaries may have changed over time. Use historically appropriate terminology while remaining thoughtful about how people and communities are described today.
- **Share cultural histories responsibly.** Acknowledge the origins of information, respect restrictions on its use, and avoid presenting another community's traditions as your own discoveries.

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Chapter 2: Research Honestly

Follow the evidence, wherever it leads.

2.1 Facts, Theories, and Family Stories

Family histories are built from many kinds of information, including historical records, personal recollections, inherited stories, and research discoveries. Each can contribute something valuable, but not all information carries the same weight as evidence. Responsible research means understanding the difference between what has been documented, what is reasonably believed, and what remains uncertain.

- **Treat family stories as valuable clues.** Oral histories and family traditions can preserve information unavailable elsewhere. Record who shared the story and, when possible, when and how they learned it.
- **Consider the reliability of information.** A firsthand account, a contemporary record, and a story repeated across generations may each offer useful information. Consider how the information was obtained, recorded, and preserved.
- **Distinguish facts from interpretations.** Finding information in a historical record does not automatically make that information accurate. Consider what the record actually says, who provided the information, and whether other evidence supports it.
- **Identify theories as theories.** A possible relationship, migration route, or family connection may be worth investigating, but it should not be presented as established fact until sufficient evidence supports it. When sharing an unproven relationship or identification, make its uncertainty clear. Once a theory enters an online family tree, it can spread as established fact.
- **Preserve uncertainty.** When evidence is incomplete or conflicting, acknowledge what remains unknown rather than filling the gaps with assumptions.
- **Allow conclusions to evolve.** New records, DNA evidence, or a fresh interpretation may strengthen or challenge earlier findings. Revising a conclusion is a normal part of responsible research.

2.2 Sources and Citations: Show Your Work

Good genealogy research depends on knowing where information came from. Recording sources allows researchers to evaluate evidence, revisit discoveries, and help others understand how conclusions were reached. A citation does not need to be intimidating or complicated to be useful. Its purpose is to make the information traceable.

- **Record sources as you research.** Note where information was found while the details are still available. Trying to reconstruct sources months or years later can be surprisingly difficult.
- **Identify the original record when possible.** A genealogy website may provide access to a document, but the website is not necessarily the creator of that record. Website addresses can change, so include enough information to identify the document and locate it again, even if the original link no longer works.
- **Provide useful details.** Depending on the source, these may include names, dates, record titles, page numbers, collection names, repositories, website addresses, or access dates.

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- **Cite family contributions.** When information comes from a relative's recollection, interview, letter, or personal collection, record its origin while respecting any confidentiality requests.
- **Connect evidence to conclusions.** Make it possible to understand which sources support a particular fact, relationship, or interpretation.
- **Make your work understandable to others.** Consistent, clear citations help future researchers evaluate your findings and continue the work without having to retrace every step.

2.3 Correcting Errors and Updating Conclusions

Genealogy research is never truly finished. New records become available, previously overlooked details come to light, and conclusions that once seemed reasonable may need to change. Recognizing and correcting mistakes is part of responsible research, not a reflection of a researcher's ability or dedication.

- **Acknowledge errors when you discover them.** If new evidence shows that information you previously recorded or shared was incorrect, make reasonable efforts to correct it.
- **Take responsibility for information you share.** If you discover that an error has spread through your own publications, family trees, or contributions to collaborative research, consider how best to notify others or update the information.
- **Be transparent about significant changes.** When revising an important relationship, identity, or conclusion, explain what changed and why, particularly if others have relied on your earlier findings.
- **Correct without assigning blame.** Mistakes can be repeated across generations of research. Focus on establishing accurate information rather than criticizing the people who recorded or shared an error.
- **Remain open to new evidence.** A conclusion supported by the best available information today may need revision tomorrow. Being willing to reconsider a finding demonstrates integrity, not uncertainty about one's abilities.

2.4 Avoiding Assumptions and Confirmation Bias

Every researcher brings personal experiences, expectations, and family traditions to their work. These influences can shape how we interpret information, sometimes without our realizing it. Confirmation bias occurs when we favor evidence that supports an existing belief while overlooking or discounting information that challenges it. Recognizing this tendency helps us approach family history with greater honesty and fairness.

- **Question your assumptions.** Shared surnames, nearby residences, similar occupations, or family traditions may suggest connections, but they do not establish relationships on their own.
- **Be mindful of historical assumptions.** Modern expectations about family structures, social roles, relationships, and personal choices may not reflect the circumstances of earlier generations.
- **Give conflicting information fair consideration.** Evidence that challenges a favored theory deserves the same attention as evidence that supports it.
- **Welcome thoughtful challenges.** Other researchers may notice overlooked details or offer interpretations worth considering. Evaluate their contributions on their merits rather than treating disagreement as criticism.

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- **Avoid selective storytelling.** Presenting only the details that support a preferred family narrative can create a misleading picture, even when those details are individually accurate.
- **Recognize personal attachments.** Years of research, emotional connections, or pride in a particular family story can make it difficult to reconsider a conclusion. Be willing to follow the evidence wherever it leads.

Chapter 3: Respect Contributions

Good research rarely happens alone.

3.1 Acknowledge Those Who Help

Genealogy is often a collaborative effort, even when we conduct most of our research independently. Relatives, librarians, archivists, volunteers, and fellow researchers may contribute information, share materials, offer guidance, or simply point us in the right direction. Recognizing their contributions is a meaningful way to show appreciation and respect for the time and knowledge they share.

- **Recognize contributions of all sizes.** A helpful suggestion, a family recollection, or assistance locating a record can be just as deserving of acknowledgment as a major research discovery.
- **Express appreciation directly.** A sincere thank-you lets someone know their time and effort were valued, whether their assistance was extensive or brief.
- **Distinguish appreciation from permission.** Thanking someone for providing a photograph, document, or family story does not automatically grant permission to publish or distribute it. Clarify how contributed materials may be used before sharing them.
- **Acknowledge assistance when sharing your work.** When appropriate, recognize people whose contributions helped shape your research, particularly when their assistance was significant.
- **Respect preferences for recognition.** Some contributors appreciate being named, while others prefer to remain anonymous. Ask before publicly identifying someone or connecting their name to sensitive family information.

3.2 Credit Fellow Researchers

Genealogy research often builds upon discoveries made by others. Fellow researchers may spend years locating records, analyzing evidence, and documenting family connections. When their work contributes to our own findings, acknowledging that effort demonstrates integrity and respect for the research community.

- **Give credit where it is due.** When another researcher's findings, analysis, or original work contribute to your research, acknowledge their contribution rather than presenting it as entirely your own. Their conclusions, written explanations, and carefully assembled findings may represent years of effort beyond simply collecting records.
- **Distinguish sources from researchers.** Citing a historical document identifies the evidence, while crediting the person who located, interpreted, or shared it recognizes their contribution. Both may be appropriate.

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- **Be transparent about collaboration.** As with other contributions, shared research deserves acknowledgment. Recognize the efforts of those involved without overstating your own role.
- **Respect attribution preferences.** The same consideration given to family contributors applies to fellow researchers. Some welcome public recognition, while others prefer privacy. Consider their wishes before identifying them or linking their names to particular family histories.
- **Remember that credit is not permission.** Acknowledging someone's research does not automatically authorize reproducing their written work, photographs, or other protected materials. Permission and ownership are separate considerations.

3.3 Copyright, Ownership, and Permission

Family history research often involves photographs, letters, documents, published works, and materials created or preserved by others. Whether these items come from relatives, fellow researchers, archives, or online collections, thoughtful researchers consider the people behind them before deciding how to use or share them.

- **Ask before sharing contributed materials.** When someone provides family photographs, letters, personal writings, or other materials, clarify whether they are comfortable with those items being reproduced, published, or distributed. Even when permission may not be legally required, asking can be a meaningful expression of respect.
- **Honor the trust behind a contribution.** Someone who shares a treasured family photograph or private letter may intend it for your personal research rather than public distribution. Consider their wishes and any restrictions they communicate.

Understanding Copyright

In the United States, copyright protection generally arises automatically when an original creative work is recorded in a tangible form, even without a copyright notice. A few basic distinctions are especially useful in genealogy:

- **Not protected by copyright:** Historical facts, including names, dates, places, and family relationships.
- **May be protected by copyright:** Photographs, letters, written family histories, original research narratives, and other creative works.
- **Generally available for reuse:** Works confirmed to be in the public domain, along with materials whose copyright owners have authorized the intended use.

Owning a physical item does not necessarily mean owning its copyright. Likewise, giving credit does not replace permission when permission is required.

Copyright exceptions, including fair use, may permit certain uses without permission. Because those exceptions depend on the circumstances, researchers should investigate when a work's status or intended use is unclear.

For more information: U.S. Copyright Office | What Is Copyright?

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3.4 Sharing Records, Photographs, and Family Stories

Sharing family records, photographs, and stories helps preserve history and allows others to benefit from discoveries that might otherwise remain unknown. However, sharing also carries responsibilities. Once information is published or distributed, it may travel far beyond its original audience and become difficult to control.

- **Consider the intended audience.** Material shared within a family or research group may not have been intended for public distribution. Think about who will have access before passing it along.
- **Distinguish originals from alterations.** If a photograph has been restored, colorized, cropped, or modified using AI or other tools, identify those changes so others do not mistake the altered version for the original. AI-generated details may not accurately reflect the original image.
- **Be thoughtful about sensitive details.** A document or photograph may contain personal information about living individuals or reveal circumstances that were shared privately. Review its contents before distributing it.
- **Protect confidentiality during collaboration.** When working with other researchers, consider whether a question can be discussed or investigated without revealing information someone has entrusted to you privately.
- **Keep family stories connected to their sources.** When passing along a recollection or inherited account, identify who shared it when appropriate, and distinguish personal memories from independently documented events.
- **Preserve important restrictions.** When passing research materials to another person or arranging for their long-term preservation, communicate any confidentiality agreements or limitations on sharing.
- **Recognize the limits of control.** Even information shared with a small audience may be copied or redistributed. Consider the potential consequences before releasing material you would not want circulated more widely.

Chapter 4: Share Responsibly

Share discoveries with care, preserving both their meaning and the trust of those involved.

4.1 What Should and Shouldn't Be Published

Genealogical discoveries can be exciting, meaningful, and sometimes deeply personal. Sharing them allows others to learn from our research, but not every discovery belongs in a public family tree, website, or publication. Responsible sharing means considering both the value of making information available and the potential consequences for the people connected to it.

- **Distinguish public information from appropriate publication.** A record may be publicly accessible without every detail being suitable for wider distribution. Consider whether republishing sensitive information serves a meaningful research purpose.
- **Protect living individuals.** Do not publish personal details, private circumstances, or identifying information about living people without their informed permission, even when those details appear in historical or publicly accessible records.

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- **Consider the purpose of sharing.** Ask whether publishing a particular detail helps document family history, supports a research conclusion, or provides useful context. Curiosity alone may not justify exposing someone's private circumstances.
- **Use discretion with sensitive discoveries.** Information involving unexpected parentage, adoption, family conflict, or other personal matters may affect people who have not chosen to participate in the research. Consider whether private communication or restricted sharing would be more appropriate.
- **Choose the appropriate level of access.** Not every finding requires a public audience. Private research files, limited family sharing, and restricted online trees may offer ways to preserve information without making it widely available.
- **Review before publishing.** Consider whether photographs, documents, or research notes contain details about other people that are unrelated to the purpose of sharing.

4.2 Respecting the Deceased

Death does not erase a person's place in family history or the dignity with which their story deserves to be told. Although deceased individuals no longer have the same privacy interests as living people, the way we present their lives can still affect surviving relatives and shape how future generations understand them.

- **Treat ancestors as people, not curiosities.** Avoid sensationalizing personal struggles, medical circumstances, family conflicts, or unusual events simply because they make an interesting story.
- **Present difficult truths with care.** Respect does not require concealing documented wrongdoing, uncomfortable facts, or complicated relationships. Share what reliable evidence establishes without unnecessary judgment or embellishment.
- **Consider the impact on surviving relatives.** Information about a deceased person may also reveal sensitive details about living family members. Consider those connections before publishing.
- **Avoid imposing modern assumptions.** Historical decisions and circumstances should be understood within their time and place, without excusing harmful actions or inventing motives.
- **Preserve the fullness of a life.** When possible, avoid reducing someone to a single event, hardship, mistake, or family controversy. A person's history is usually more complex than any one record suggests.

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Research with Integrity

Family history is more than a collection of names, dates, and documents. It is a record of real people whose lives, experiences, and relationships deserve thoughtful consideration.

Ethical genealogy does not require perfect knowledge or agreement about every discovery. It asks researchers to respect privacy, follow the evidence, acknowledge the contributions of others, and consider the consequences of sharing what they find.

Our responsibility is neither to rewrite the past nor to decide how others should feel about it. It is to preserve and present family history faithfully while respecting the people whose stories we encounter.

A family connection may be shared, but a relationship must be chosen.

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