



Research Services

## Sample Research Proposal

Dear Reader: The nature of the lineage of my client, for whom the Research Proposal below was written, produced an unusual amount of readily available information during my preliminary investigation. Unfortunately, the same volume of ancestral information as set out below would likely not be found during a preliminary investigation into most ancestries.

### *Research Proposal: Paternal Ancestry of Marie Stella ROXBURGH*

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Prepared 20 April 2001 By:  
Ancestry Solutions  
P.O. Box 230386,  
125 Carlton Street,  
St. Catharines, Ontario

L2R 1R0  
(289) 273-6590  
email:  
[executiveoffice@ancestrysolutions.com](mailto:executiveoffice@ancestrysolutions.com)

**OBJECTIVES OF RESEARCH:**

- I. To correctly identify or, alternatively, verify the reputed father of Marie Stella Roxburgh, she having been born on or about 9 January 1896.
- II. To attempt to correctly identify the parents of the father of Marie Stella Roxburgh.
- III. To attempt to correctly identify the wife of the father of Marie Stella Roxburgh.
- IV. To attempt to correctly identify the siblings of the father of Marie Stella Roxburgh.
- V. To attempt to correctly identify the paternal grandparents of the father of Marie Stella Roxburgh.

**SUMMARY OF KNOWN INFORMATION:**

1. Marie Stella Roxburgh was born on or about 9 January 1896 at the Carmelite Convent located on Church Street, Kensington, London, England. She was subsequently christened on 13 January 1896 at St. Francis Assisi, Pottery Lane, Notting Hill, London as Mary Theresa Carmelita Roxburgh. She died on 17 October 1971 at London England and was buried at Pinner Cemetery, Greater London.
2. Through information gathered from you and from Barbara Pawliszyn it is known that Marie Stella's mother was Shan [sic] Jones, the daughter of Edward and Mary Jones. The known siblings of Shan were Enoch, Margret, Henry, Myfanwy, Matilda and David. Through information gathered from Barbara Pawliszyn it is known that a couple surnamed Banks raised Marie Stella.
3. Marie Stella Roxburgh married circa 1917 John Smart Galvin. Although the place of her marriage is unknown it is presumed to have taken place at Edinburgh, Midlothian, Scotland.
4. The children of Marie Stella have always been lead to believe that her father was one James or, possibly, John James Roxburgh but that the middle name of her father was definitely James.
5. It is also known by your family that James Roxburgh had a wife and at least two children who were named Winnie and John.
6. Your family has also been raised with the information that there is some relationship to the surname Carnagie although the nature of that relationship is unknown.
7. One of numerous letters had been written by one J. Roxburgh to Marie during her lifetime that was signed, "your affectionate father J. Roxburgh". That letter was dated 4 September 1924 and bore a return address of 25 Gladstone Street, Glasgow.
8. The above referenced letter contains many clues to the identity of the correspondent, J. Roxburgh. For example, he states that his sister, 'Bella' is related to her own husband who is known by the name of 'Wills'. The precise degree of relationship between the two is not stated but he has stated that Bella and Wills are "cousins, once removed". J. Roxburgh further states that Wills is a lawyer and was the son of Dr. William Roxburgh's third wife who was a Boswell. J. Roxburgh makes

reference to the fact that his own grandfather was also a son of the aforementioned Dr. William Roxburgh but through Dr. Roxburgh's second wife. J. Roxburgh also refers to another person named Wills and indicates that that Wills is also married. Among the remaining people mentioned in the letter are a Jeanette, who is described as being a French banker's daughter, and two females names Elsie and Sibel. Although no direct reference to relationships between Wills, Jeanette, Elsie and Sibel are stated J. Roxburgh does refer to "Wills French wife". Accordingly, for the time being it may be assumed that Jeanette is the wife of Wills. Elsie and Sibel are either Wills and Jeanette's children or the sister of this particular Wills.

### **PRELIMINARY INVESTIGATIONS:**

To establish an immediate starting point for this research and in order to provide an accurate estimate of fees and disbursements for this search certain preliminary investigations were necessary. Those preliminary investigations have now been completed.

I have examined the International Genealogical Index, the British Vital Records Index, the Old Parochial Registers of Scotland index, Ancestral File and the Pedigree Resource File, all of which are published by the Genealogical Society of Utah. I made searches for

- i. the birth/christening of James and John James Roxburgh who was born circa 30 August 1861;
- ii. the marriage of a James Roxburgh or John James Roxburgh;
- iii. the marriage of female Roxburgh to a Wills or William Roxburgh;
- iv. the marriage of a William Roxburgh to a woman bearing the surname Boswell;
- v. the birth/christening of a Wills or William Roxburgh to a father named William Roxburgh and a mother surnamed Boswell.

I have also conducted a search of the 1881 British Isles Census Index (which does not include Ireland) in an effort to locate the families of Dr. William Roxburgh and his son, Wills or William Roxburgh. I also searched the index for any reference to James or John James Roxburgh who may have been about 21 years of age at the time of that census. I have also conducted a free search of the English and Scots Origins database. At this time, having regard to the sparsely identifiable information returned on the free searches I do not feel that a pay-for-view search is warranted.

I have also completed a search of the FreeBMD website for the registrations of birth of:

- i. Marie Stella Roxburgh as well as variant name possibilities;
- ii. James Roxburgh or John James Roxburgh;
- iii. Winnie Roxburgh as well as variant name possibilities such as Winnifred; and,
- iv. Wills or William Roxburgh

And for the marriages of:

- v. James Roxburgh or John James Roxburgh;
- vi. Wills or William Roxburgh to a woman also surnamed Roxburgh; and,
- vii. William Roxburgh to a woman surnamed Boswell.

I have also examined all readily available printed sources, which having regard to the station of Dr. William Roxburgh, and his son, Wills or William, may have some applicability to yield information, to wit: Fairbairn's Crests, The General Armoury, Armorial Families, Who's Who for various years, Who Was Who in various late 19th and early 20th century issues, Burke's Landed Gentry, The Genealogist's Guide, and the Index to Pedigrees and Arms filed in the British Museum

Lastly, I have examined several appropriate and applicable websites, including the website of the Carmelite Order in England, A2A, Procat and the private catalogue collections of several universities, with a view to obtaining usable information for this search. The above processes and the results

thereof have been used to determine the likelihood of success of this research, to reasonably anticipate difficulties that may be encountered, and to reasonably estimate the fees and expenses that will be incurred during this search.

### **RESULTS OF PRELIMINARY INVESTIGATIONS:**

A great deal of information has come forward during my preliminary investigation which I shall now report to you. I have attached to this Research Proposal a copy of the family tree of Dr. William Roxburgh. All individuals that have been enclosed with a box border represent your line of Roxburgh ancestors. This is only a presumptive tree which has been drawn on the basis of my preliminary investigations and I would point out that although I have managed to pull together information that partially answers several of the objectives of this research, there still remains the specifics – the proof – of those relationships and people identified which must yet be addressed. If it should happen that through obtaining the proof of the people and relationships that have been identified during my preliminary investigation is correct the points listed immediately below are the unknown points which you may also wish to pursue in future. Some of this missing information may come forward during the research which is proposed herein such as the names of J. Roxburgh's paternal grandparents.

- birth and death dates of James Roxburgh, Gent.;
- parents of Sophia Haig Goodfellow;
- the names of J. Roxburgh's paternal grandparents;
- the dates and places of birth, marriage and death of J. Roxburgh's paternal grandparents;
- the name of J. Roxburgh's paternal great-grandmother inasmuch as we know that she was the second wife of Dr. William Roxburgh and therefor was not Anne Elizabeth Boswell;
- the names of Dr. William Roxburgh's other children from his first and second marriages
- the names of the parents of Dr. William Roxburgh, which could easily be obtained by ordering the marriage certificate for his marriage to Anne Elizabeth Boswell.

The proof of relationships and the identification of the various members of the Roxburgh family can only be satisfied through research in the primary and secondary records that exist and which are available to us. It is the obtaining of that proof that will become the focus of this proposed research and which has been addressed in the remaining sections of this Research Proposal. I have dealt with the information under subheadings, by person or family group, so as to attempt to keep the information from being confused between the various William Roxburghs.

### **Dr. William Roxburgh, the botanist:**

Inasmuch as there exists family lore within your family that there may be some relationship to the notable Dr. William Roxburgh, the botanist, and not to be confused with Dr. William Roxburgh, the father of Wills Roxburgh, the lawyer, during my preliminary investigations I did include searches for any readily available information pertaining to him. From the sources examined I have learned that Dr. William Roxburgh, the botanist was born at Underwood, Craigie, Ayr, Scotland on 3 June 1751. He died during 1815 at Park Place, Edinburgh and was buried at Greyfriars Cemetery in Edinburgh in the tomb of the family of Boswells of Auchinlech.

Although Dr. Roxburgh (1751-1815) had spent the majority of his life living in Calcutta, India and other foreign places, for a brief period of time, namely, 1805 through 1808, he resided at Chelsea, London, England while he recuperated from a serious illness. Dr. Roxburgh had married three times. His first wife was a Miss Bonte who was still living as of July 15 1798 when she wrote a letter to her

daughter, Mary Stone. Dr. Roxburgh's second wife was a Miss Huttenmann but unfortunately no further information was found concerning her. Dr. Roxburgh's third and last wife was a Miss Boswell. From his first marriage, Dr. Roxburgh had one daughter named Mary, as noted above. Mary married one Henry Stone. Mary died during 1814.

From his second marriage he had five sons and three daughters. Only the names of three of his sons were found: Bruce, James and Robert. All three of these men enlisted in the Indian army and were so employed as of 1832. Capt. Bruce Roxburgh served in the 6th Cavalry; Capt. James Roxburgh was born circa 1802 at Calcutta and served in the 39th Infantry. Unfortunately, no further information was forthcoming concerning Robert.

From his third marriage to Miss Boswell, Dr. Roxburgh had one son named William as well as two daughters. Unfortunately, no specific information was found concerning the dates or years of Dr. Roxburgh's marriages or the dates or years and, in some cases, the names and dates or years of birth of all of his children. In addition to the identifiable information concerning Dr. Roxburgh, the botanist, I also found two references that may or may not have relevance to his direct family. A George Roxburgh was enlisted as a cadet in the India Army 1803 through 1806. Furthermore, a John Roxburgh was found to be a nurseman of the Botanical Gardens at Calcutta during the period 1803 through 1810.

#### *Dr. William Roxburgh 1812-1897:*

As stated above, from the letter of J. Roxburgh, which was dated 4 September 1924 I was able to determine that the paternal great-grandfather of J. Roxburgh was one Dr. William Roxburgh. In that letter J. Roxburgh further indicates that the third wife of Dr. Roxburgh was a Boswell lady and that their son Wills, presumably shortened from William, was a lawyer and that he had married J. Roxburgh's sister, Bella.

From my preliminary investigation I have learned that Dr. William Roxburgh had been born during 1812 and died during 1897. Unfortunately, the places at which those events had occurred were not stated. Dr. Roxburgh married Anne Elizabeth Boswell on 16 December 1857 at Duddington, Midlothian, Scotland. Dr. Roxburgh and his wife had at least three children, namely:

1. William Henry, born 4 April 1859 at Duddington;
2. Alexander Bruce, born 19 August 1860 at Leith. He subsequently died 17 March 1953 at Locks Heath, Hampshire, England; and,
3. Mary Sibella, born 6 December 1863 at Leith.

#### *William Henry Roxburgh 1859 - ?:*

William Henry Roxburgh, the son of Dr. William Roxburgh and Annie Elizabeth Boswell received a grant of arms through the Herald's College, England. It is from the lineage included in that grant that a good proportion of the information concerning him and his immediate family was obtained. In the lineage the particulars of William Henry's father are recited i.e. his birth, death and marriage years and his professional designation which was stated as M.D. Edinburgh and a Fellow of the Royal College of Physicians at London. Most importantly, the lineage recites that William Henry Roxburgh had married Sibella Roxburgh who was the daughter of James Roxburgh, Gent. during 1889. The lineage further recites that he had one son and two daughters. The son was named William Roxburgh, Gent, born 1898 and married 1923 to Jeannette who was the daughter of one Levast. Unfortunately, the names of the two daughters of William Henry Roxburgh are not given. However, I believe that from the letter of J. Roxburgh of 1924 we can presume the daughters to be the Elsie and Sibel that he mentions. William Henry Roxburgh's address at the time of the grant of arms was given as 23 John Street, Bedford Row, London. Furthermore, we can safely assume that the grant of arms was made no sooner than 1947 as in the lineage that accompanies the grant reference is made

to William Henry's own grandson, William Levast Roxburgh as being a Gent. who had been born during 1927. Inasmuch as William Levast Roxburgh was described as a Gent. he would have to have been at least 20 years of age. Hence we can safely assume that the grant of arms was made no sooner than 1947.

**Sibella Roxburgh, wife of William Henry Roxburgh:**

Sibella Roxburgh was the second child born to James Roxburgh, Gent. and Sophia Haig Goodfellow. Sibella was born 22 October 1871 at Melrose, Roxburgh, Scotland. Among her siblings were the following:

- a. Andrew James, born 28 August 1860 at Jedburgh, Roxburgh, Scotland;
- b. John James, born 24 February 1873 at Melrose; and,
- c. Elizabeth Boswell, born 26 May 1874 at Melrose.

Sibella's father, James Roxburgh married Sophia Haig Goodfellow at 3 August 1860 at Edinburgh, Midlothian, Scotland.

**James Roxburgh, Gent.:**

Other than his marriage date and the name of his wife, no information was found during my preliminary investigation concerning James Roxburgh, i.e. dates and places of his birth and death and the names of his parents.

**James Roxburgh, father of Marie Stella:**

There are two factors that are constant in relation to James Roxburgh, the father of Marie Stella. Those are:

1. his middle name was James, but his first name is questionable – could be John; and,
2. his birthdate is on or about 30 August presumably in 1861.

From my preliminary investigations I would point out the son of James Roxburgh, Gent. who was named Andrew James Roxburgh. He was supposedly born on 28 August 1860. Although, I realize that this is not an exact match on date I strongly suspect that it was he who was the father of Marie Stella. In the letter of J. Roxburgh he states that he "got over my 63rd birthday fine last Saturday". J. Roxburgh does not state that it was the actual day of his birth nor does he indicate if the 'last Saturday' was simply a birthday celebration. So we cannot really say that J. Roxburgh's actual day of birth was 30 August.

Furthermore, I have to caution you that the terminology used in historical records, even used in a letter of 1924, will have a different connotation to what we are familiar with today. We also have to be careful in considering the age stated by someone. Through my many years of experience I know all too well that as people aged they truly forgot just how old they were. Some people overestimated their age by many years. Others underestimated their age by just as many years, while the remainder stated their age within close proximity to their actual verifiable age. I think in reference to the "63rd" birthday we have to take into consideration the differences in terminology as well as the possibility of forgotten actual age. Writing so close to his last birthday, J. Roxburgh may have simply mistakenly written his age as "63rd" when he should have possibly written it as 64th. An example of this type of mistaken can be taken from today wherein it is not at all uncommon at the change of the New Year to continue to write the old year on cheques and documents.

Lastly, in relation to the birthdate of Andrew James Roxburgh I also have to advise that the record from which this information was extracted may have also been incorrect in stating the year of birth. This information came from an index of births and may well have been mistranscribed during the original indexing of the information.

**RESEARCH REQUIRED TO FULFILL SEARCH OBJECTIVES:**

As stated above, although much information has come forward through my preliminary investigation there still remains a number of points that need to have clarification. There also remains the issue of proving or attempting to prove, through the use of primary and secondary records, the nature of the relationships of the various people identified as well as certain dates of birth/christening, marriage, and death.

I. The first research objective is to identify or verify the reputed father of Marie Stella Roxburgh, who is believed to be a man who bore the middle name of James and the surname of Roxburgh. Although the family information is that no birth certificate could be found for her, I have to advise that the laws of England in 1896 concerning the registration of births was such that no child could be registered under the surname of a reputed father unless that father attended at the registration office to have his wishes and acknowledgement of paternity known. Furthermore, some difficulty in the name at registration also exists inasmuch as Marie Stella had been christened as Mary Theresa Carmelita Roxburgh. It may well be that the combination of these two factors had sufficiently confused the issue resulting in no birth registration being found for her.

Lastly, I would advise that registration of all births was made mandatory in England as of 1875. Consequently, her birth has to have been registered. If Marie Stella had been taken by Mr. and Mrs. Banks shortly after her birth they may have attended to the registration at some place other than in London England.

Additionally, all marriage registrations required the name of the father of each party to the marriage to be included or left blank, as the case warranted. It may well be that she simply stated the name of the man who raised her as her father. However, in an attempt to identify or verify the full name of her reputed father the following documents will be required:

1. birth certificate of Marie Stella Roxburgh; and,
2. marriage certificate of Marie Stella Roxburgh.
3. I also believe that it would be in the best interests of this aspect of the research to attempt to locate a Will amongst the members of the now known Roxburgh family that may refer to Marie Stella in some stated relationship capacity.

II. In order to correctly identify the parents of J., or James, Roxburgh we have to work from the already known-to-be-correct information that was found in the grant of arms given to William Henry Roxburgh. Although from that grant we have learned that Sibella Roxburgh's father was one James Roxburgh, Gent., we do not have any proof as yet that the Sibella Roxburgh who was born 22 October 1871 at Melrose, Scotland was one and the same Sibella Roxburgh who married William Henry Roxburgh. It is, after all, merely the assumption that they are one and the same person that has brought us this far. Now we have to find the proof that they are one and the same person. To that end, the following will be required:

1. a search of any available Glasgow directories or voter registrations for 1924 which would provide the name of the resident of 25 Gladstone Street (now called St. Georges Road)
2. a search of the 1891 census for the place at which Sibella and William Henry Roxburgh resided at that time, which will necessitate a search of available postal directories. The census will provide the place of birth of Sibella Roxburgh as well as her then current age.

3. The marriage certificate of Sibella Roxburgh to William Henry Roxburgh which will confirm her father's name as well as her age and marital status at that time.

4. A search of The London Times for an obituary for Sibella and/or William Henry Roxburgh with a search thereafter for a Will that may have been left by either one of them all with a view to obtaining confirmation of names of siblings of Sibella as well as nieces and nephews.

III. In order to correctly identify the name of the wife of J., or James, Roxburgh, we first have to be certain of James' proper name. It is hoped that through the research set out in steps I. And II. Above we will learn that critical piece of information. In the interim, it would be fruitless to attempt a search of the 1881, 1891 or the 1901 census as there are far too many James and John Roxburgh's throughout Britain. At such time as we have a more solid idea of his proper name:

1. a search of the civil marriage registration indices will have to be conducted and the marriage certificate ordered.

IV. In order to correctly identify the children of J., or James, Roxburgh, once his marriage certificate has been received:

1. a search of the 1901 census. This census will also provide the critical information of J. Roxburgh's age and birthplace, which will be required to prove his parentage. 2. Also a search for a Will that may have been left by J., or James Roxburgh

V. In order to correctly identify the paternal grandparents of J., or James, Roxburgh:

1. a search of the 1861 and 1871 census for the locale in which the family is known to reside at that time and which would include J., or James, Roxburgh as a child within his family unit;

2. obtain the marriage certificate of the parents of J., or James, Roxburgh which will provide, at the least, the name of the paternal grandfather; and,

3. if the names of both paternal grandparents are included on the above mentioned marriage certificate, as would be the case on a Scottish marriage certificate, this aspect of the search will be satisfied. However, if the marriage of J., or James Roxburgh's parents is found to have occurred in England but after the commencement of civil registration on 1 July 1837 then a search for that marriage will also have to be undertaken along with the certificate ordered. If the marriage is found to have occurred in England but before 1 July 1837 then a much more in depth search will be required and would have to form the basis of a further research proposal.

#### **ESTIMATED FEES AND EXPENSES:**

All amounts set out hereunder are expressed in Canadian Dollars. All research fees are charged at the rate of \$40.00 per hour and where research time is expected to be less or more than one hour, the fees are prorated for that portion. For example, if research time were expected to be 1-1/2 hours the fee would be \$60.00 calculated as \$40.00 for the first hour and an additional \$20.00 for the remaining one-half hour. The minimum time billed is 15 minutes or \$10.00. Some aspects of research require the processing of an application for service or documents rather than a fee for straight research time. In those cases a flat-rate fee is charged in place of a research fee. All expenses listed below are expenses that are expected to be incurred for the acquisition of research resources, including birth, marriage and/or death certificates; and microform rental fees.

Not included in the estimated fees and expenses listed below are the expenses that would accrue for photocopies, certified copies or notarial copies of any documents, if required. Also not included are out-of-pocket expenses that may be incurred during this research for long distance telephone calls,



courier, or any costs associated with research conducted outside of the City of St. Catharines, such as parking and mileage. Any costs that would be associated with engaging an independent researcher outside of Canada, should the same become necessary, have not been included in the estimated fees and expenses set out below.

Research Activity	Expenses	Fees
Search of G.R.O. birth index for the birth of Marie Stella or Mary Theresa Carmelita Roxburgh; Time required 3 hours maximum		\$ 120.00*
Acquisition of birth certificate of Marie Stella; Certificate fee plus British agent's fee plus fee for application for certificate	\$ 25.00	7.00
Search of Scottish G.R.O. marriage index For marriage of Marie Stella Roxburgh; Fee for search of ½ hour		20.00
Acquisition of marriage certificate of Marie Stella And John Smart Galvin, if from Scotland Certificate fee plus fee for application for certificate	25.00*	7.00
Search of 1924 Glasgow directory or voters Registration in order to identify occupant of 25 Gladstone Street; search fee of Scottish agent Plus fee for application for search	25.00*	7.00
Search of 1891 London postal directory; Microform rental plus fee for search of 1 hour	5.25	40.00
Search of 1891 London census for Sibella and William Henry Roxburgh; search of maximum 4 hours plus microform rental fee	2.40	120.00*
Search of G.R.O. marriage indices England and Scotland, if necessary, for marriage of Sibella and William Henry Roxburgh; Search time of 1 hour		40.00*
Acquisition of marriage certificate of Sibella Roxburgh And William Henry Roxburgh; Certificate fee plus fee for application for certificate	25.00*	7.00
Search of Official London Times index for death notices Of Sibella and/or William Henry Roxburgh, including Acquisition of copy of obituary/obituaries; direct expenses To be incurred in search of index and acquisition of Obituaries cannot be estimated at this time; flat-rate Processing fee		20.00
Search of Principal Probate Registry files and acquisition Of copy Wills of Sibella and/or William Henry Roxburgh; Direct expenses of Principal Probate Registry office Cannot be estimated at this time; flat-rate processing fee		20.00

Search of 1901 Scotland census for J. Roxburgh as soon As his proper name is learned; direct expenses associated With searching index and obtaining copy thereof plus Search fee of ½ hour	45.00*	20.00
Search of G.R.O. marriage indices Scotland and England For marriage of J. Roxburgh as soon as his proper name Is learned; microform rental fees plus Search time of 1 hour	10.50*	40.00*
Acquisition of marriage certificate of J. Roxburgh Certificate fee plus fee for application for certificate	25.00*	7.00
If required, search of 1901 English census as soon as the same becomes available for J. Roxburgh; Direct expenses for agent's fees associated with Searching the index are not yet available due to technical difficulties being experienced by the producer of the information; flat-rate processing fee		20.00
Application for search of closed G.R.O. indices of death for death registration of J. Roxburgh and acquisition of certificate in order to facilitate search for Will providing death occurred in Scotland; direct expenses to be incurred in search of index cannot be estimated as charges are based on each five-year period searched; fee for certificate plus flat-rate processing fee for index search and acquisition of certificate;	25.00	20.00
Search of Probate Registry files and acquisition Of copy Will of J. Roxburgh; direct expenses of Probate Registry office cannot be estimated at this time; flat-rate processing fee		20.00
Search of 1861 and 1871 census whereon J. Roxburgh Will be shown as a child within his family unit in order To obtain places of birth of his parents and approximate Years of birth of all three individuals; microfilm rentals And search time of 4 hours maximum	21.00*	120.00*
Acquisition of birth certificate of J. Roxburgh based on His birth having occurred in Scotland between 1855 and 1875; application fee to Salt Lake City plus fee for application for certificate	3.50	7.00
Acquisition of marriage certificate of parents of J. Roxburgh based on marriage having occurred in Scotland between 1855 and 1875; application fee to Salt Lake City plus fee for application for certificate	3.50	7.00
<b>ESTIMATED FEES AND EXPENSES</b>	<b>*\$ 241.15</b>	<b>*\$ 669.00</b>

\*The maximum estimates are based on the worst-case scenario whereby it becomes necessary to undertake each of the research steps outlined above. In all cases, any research time which is expressed as a maximum will not go above that estimated length of time unless the quality of the

records is extremely poor, difficult to read, or records become unusually difficult to obtain. The estimate of expenses of \$241.15 does not include the costs that will be associated in acquiring some of the documents.

Expenses that cannot be estimated have been marked in bold face type in the above itemization. Expenses for those said services and/or documents that result in an expenditure of \$50.00 or less will be obtained as part of the normal course of this research. If those said expenses would result in an expenditure that is greater than \$50.00 I will first contact you to seek your instructions on whether or not to proceed to obtain the services and/or documents in question.

**DIFFICULTIES THAT MAY BE ENCOUNTERED:**

My chief concern with this research is that we may discover that my preliminary investigation has turned up a parallel family and not the actual family of your particular J., or James, Roxburgh. A parallel family is one that exists usually along a different branch of the family being sought out and as the relationship is close naming patterns of children are similar. If this happens to be the case, I would expect that I will learn of that by the time I have completed steps I. and II. of the proposed research. I will most assuredly contact you the moment it appears that we have a parallel family represented on the chart of Dr. William Roxburgh. Personally speaking, I do not believe that we have a parallel family situation. I am reasonably confident that I have identified a presumptive family lineage for your J., or James, Roxburgh.

My second concern with this research actually grows out of the fact that the family is well placed in status. Members of families that are well placed tend to migrate between various cities and, in your case, between at least two countries, Scotland and England. This may prove troublesome in tracking down the registrations of births, marriages and deaths. Furthermore, it may also make it more difficult to determine which country and, in turn, which court any application for probate of a deceased's estate was sought. Furthermore, there is every possibility that the birth, marriage, or death of a direct line ancestor took place in a foreign locale. If this should happen to be the case, expenses and research fees as well as application fees may make it prohibitive to continue with the research.

Thirdly, although I have chosen to start the search for Sibella and William Henry Roxburgh with a search of the 1891 London census it may well be that they did not reside in London at that time. I will only discover this information after a search of the London postal directory. If they did not reside in London during 1891 a search of the 1901 census for England will be required in an attempt to locate them. At the present time the Public Record Office has suspended access to the nominal index of that census due to serious technical difficulties. There has been no news from the Public Record Office as to when it intends to re-instate the service. Additionally, it may happen that even after searching the 1901 census index I may discover that William Henry and Sibella Roxburgh were away from the country. If this happens to be the case a search of the 1901 census index for Scotland would be the only other option open.

Similarly, although I have chosen to start the search for J. Roxburgh with a search of the 1901 Scotland census it may well be that he did not reside in Scotland at that time. I will only discover this information after a search of the 1901 Scotland census index. If he did not reside in Scotland during 1901 a search of the 1901 census for England will be required in an attempt to locate him. The same difficulties with accessing the 1901 census index through the Public Record Office also exist here.

Lastly, please be aware that, although I have a reasonable expectation of achieving overall success in this research, research of some or all historical events may fail at any time during the research procedure. Some of the failings are produced the state of preservation of the records. Some records may be lost, destroyed, unreadable, or statutory events may have gone unregistered. Some failings are also the direct result of some action an ancestor took during his or her life. For instance, it is not unusual to discover that an ancestor moved from a known location immediately prior to a census

enumeration. Unfortunately the failing does not often appear until after the expenditure of money for a resource or research time has been invested. Consequently, all research time and expenditures for resources that are made prior to the discovery of a failing research procedure are still billable to this project and payable.

**EVENTS WHICH MAY ALTER ESTIMATED FEES AND EXPENSES:**

The primary cause of any increase of any of the fees and expenses set out in this Research Proposal would come through one or more of the events occurring that have been addressed in the immediately preceding section titled 'Difficulties that may be Encountered'. Please note that most of the research time set out above has been expressed as a "maximum" time required. It may well be that in some or all of those particular cases the examination of the record can be completed in a shorter time than estimated. You will only be charged for actual research time spent on any one facet of this project. Conversely, should a record be particularly difficult to read speedily due to its poor state of preservation at the time that it was microfilmed a cost overrun on research time may be incurred.

Lastly, an increase in expenses may be incurred should one or more of the research avenues raise their own pricing of a research resource. For instance, at this time the Family History Centre charges \$5.25 to rent one microfilm resource. However, recent increases passed along from the Family History Library in Utah to the centres may prompt an increase in the current microfilm rental rate.

**RETAINER REQUIRED:**

In order to begin the research set out herein I will require a retainer from you which is equal to one-third of the estimated fees plus the estimated expenses for certain certificates and overseas searches which can be conducted now, totaling of \$370.00. Monthly progress reports will be prepared at the end of each month and delivered to you commencing during June 2002. If you would like to have your reports emailed to you I shall be happy to accommodate you. Accompanying those reports will be a complete Statement of Account for fees and expenses incurred during the billing period as well as a Retainer Account Statement setting out the amount of retainer used during the billing period and any balance of funds to your credit then remaining on hand.

**TARGET COMPLETION DATE:**

It is difficult to estimate the target completion date of this project as we are largely dependent on outside agencies to conduct searches of privately-held and closed indices. Furthermore, we are dependent upon the length of time it will take for the resources that are to be acquired through the Family History Library at Salt Lake City, Utah to reach St. Catharines. Generally, microfilms are received within two to three weeks after the order is placed. Thereafter, it may be up to three weeks before I am able to fully examine each film.

I would also advise that the Family History Centre will be shutdown for summer holidays between May 28, 2002 and June 30, 2002. Consequently, microfilm resources cannot be requisitioned until the centre reopens in July. In the interim, I would still be in a position to requisition certain of the certificates direct from Salt Lake City, Utah. Please be aware that direct requests to the Family History Library at Salt Lake City take anywhere from eight to twelve weeks to fulfill.

I trust that you will find the within Research Proposal in order but I am certain that you will have many questions. I look forward to meeting with you to discuss this proposal and receiving your instructions regarding the same.