

You Can't Take It With You!



Fairport Library Genealogy Club, 19 Sep 2022

All Slides are available at...

- www.dennisAhogan.com
- Look for Lectures & Handouts tab
- Everything is free on the site

In the Good Ol' Days...

- We only had physical stuff - stuff that everyone could see & touch
 - Books
 - Binders
 - Folders
 - Maps
 - Photos
 - Boxes
 - Paper scraps
 - Sticky notes
 - Ephemera & other artifacts

But now we've added...

- Your Computer(s)
 - Genealogy database programs & content
 - Supporting files, like spreadsheets & photos
 - (Is your content saved on the most up-to-date media so it's compatible with current or future technology?)
- Internet
 - Subscription & Free sites that contain your content
 - Family trees
 - DNA
 - Email - inquiries and responses
 - Social Media

It's more fun to research
than to organize!

- However we may need a timeout to organize
- While organizing, we could prepare a "Genealogy Directive"

What's a Genealogy Directive?

- A document prepared by you which details what you have & what is to go where.
- Should be kept with your "important" papers.
- Relevant individuals should know of its existence and whereabouts (and probably have their own copy).
- Most states currently have estate laws that accommodate digital assets. Ask your attorney about including digital assets in your will.
- [State-by-State Digital Estate Planning Laws](#)

What's a Genealogy Directive?

- [How and Why You Should Write a Social Media Will](#)
- ... "Like with a traditional will, you'll need to appoint someone you trust as an online executor. This person will be responsible for closing your email addresses, social media profiles, and blogs after you are deceased." ...

Genealogy Directive - The Who

- Indicate the person with overall responsibility for distribution.
 - Include a list of backup individuals in case the primary person becomes unavailable.
- Candidates:
 - Descendent or family member who has contracted the genealogy disease and wants to continue your research
 - Or a person who is willing to distribute items per your instructions.
- You must talk to these folks to make sure they are OK with this “opportunity.”

Genealogy Directive - The What

- An inventory of both physical and digital content.
- For each item, indicate what individual or organization is to be the recipient.
- For each digital item, specify instructions for accessing along with usernames and passwords.
 - Designated person must have the technical skills to follow your instructions.

Genealogy Directive - The What

- The more specific the inventory & directions, the more likely your wishes will be met.
- You should contact proposed recipients with the relevant inventory lists to see if they will accept your materials.
 - Possible recipients include local historical society, genealogical society and/or county archives, The Genealogy Center at the Fort Wayne Library (<https://acpl.lib.in.us/donations>), FamilySearch (https://www.familysearch.org/en/wiki/Family_History_Library_Donations).
 - Organizations may accept only certain materials or formats.
 - See <http://www2.archivists.org/publications/brochures/donating-familyrecs>

Digital Assets In Your Estate Plan

- <https://www.takecontrolbooks.com/digital-legacy>
- <http://www.marketwatch.com/story/how-to-include-your-digital-assets-in-your-estate-plan-2016-08-17>
- <http://mashable.com/2014/06/24/social-media-death>
- <http://lifehacker.com/this-graphic-shows-what-happens-to-your-social-accounts-1598128947>
- <http://media.familysearch.org/will-essentials-what-happens-to-your-tangible-and-digital-stuff-when-you-die/>
- https://www.dropbox.com/s/g6b58pc8bzwcqbp/Sample_Beneficiary_Agreement.docx?dl=0

Some Questions To Consider

- What's going to happen at subscription sites when your credit card is no longer functioning?
- Will your successor be able to access your internet content at
 - Family trees, Emails, etc.
 - **The service provider may delete the account & contents before heirs receive legal access.**
- What other questions should we be asking?

Your Email Address

- I think the goal is to pass assets down to your "successor."
- You probably have left a footprint on the internet... family tree, inquiries, emails in the hopes that someone will contact you with breakthrough info.
- For all genealogy internet activities, use a "permanent" email address (like gmail) so that your successor can benefit from future contacts.
- Document your "permanent" genealogy email and password in your Genealogy Directive.

Social Media

- Many service providers have digital inheritance policies like dropbox, facebook, twitter.
 - The offerings will continue to expand. Try searching on "*servicename deceased*"
- Google Inactive Account Manager, <https://www.google.com/settings/u/0/account/inactive>
 - Can indicate what google is to do with gmail, youtube, etc content after a certain length of inactivity.
- <http://lifehacker.com/how-to-set-up-a-facebook-legacy-contact-for-when-you-1685544248>

Some Online Aids

- Services: [SecureSafe](#), [DocuBank](#), [Dead Man's Switch](#), [Knotify.me](#), [Afternote](#)
- Will the above companies stay in business?
- [The Digital Preservation Coalition](#) has many useful resources including *Personal Digital Archiving* by Gabriela Redwine

Possible Strategy

- Ways to make your research available when there's no one to take over (or even if there is you might want to do these):
 - Upload to free online trees (more info on trees follows)
 - Your genealogy database program allows you to generate PDF documents of your research. Text and spreadsheet files can also be saved in PDF format. These can be saved on free sites such as <https://www.google.com/drive/> (15 GB free) and are searchable by search engines.
 - These same PDF documents can be sent to repositories (check with them first) such as Family History Library, New England Historical Genealogical Society, and libraries and historical societies in your local and ancestral communities.

Possible Strategy - Cont'd

- Save videos in [youtube.com](https://www.youtube.com) and pictures in [flickr.com](https://www.flickr.com). Both are owned by google and their contents will “always” be kept in an up-to-date format.
- Save emails in an alternative format.
- Bottom Line: Have your content saved in a format that is easily accessible to your heirs! Maybe do an annual export.

What has changed in the last few years

- Online trees are developing
 - Supporting infrastructure is improving
 - Sourcing is improving
 - Relevant apps are improving
 - Familysearch's Memories allows uploading content and links to individuals in your family
 - Can upload text, images, audio
 - Free
 - UNLIMITED space

Online Trees

\$	site	Import Type	tree type	autosearch
free	familysearch.org	~no gedcom	one tree	Y
free	wikitree.com	gedcom	one tree	N
free	werelate.org	gedcom	one tree	N
pay	ancestry.com	gedcom		Y
pay	myheritage.com	gedcom		Y
pay	geni.com	no gedcom	one tree	Y
pay	findmypast	gedcom		Y

All sites: uploading a tree is free

Pay sites: can search, but to see all content, must subscribe

Pay sites: non-subscribers can not contact you

familysearch: anyone can modify info in "your" tree, but they can not modify anything in your Memories

Another Possible Strategy

- It has never been easier to publish in book form.
- Lorine McGinnis Schulze at [Olive Tree Genealogy](#) creates "coffee table" books for certain surnames or lines from her family. She gives copies to family members at holidays and to local historical societies if appropriate.
- She uses [Shutterfly](#) to publish, but there are other services available.
- If you have content that might have broader appeal, you can publish via [Createspace](#) and your book will be sold through Amazon.

Another Possible Strategy

- Stories - making them available for generations to come
 - You want the stories that you collect to be sharable with your descendants.
 - Your stories can be in the form of text, audio, and video. Video will be the most approachable media for younger family members.
 - You want to save your stories on a free and “permanent” site so they are easily available for a very long time.
 - On familysearch.org you can now save text and audio stories (Memories). You can save your videos in youtube.com.

Books That Might Help

- *ABA/AARP Checklist for My Family*
by Sally Balch Hurme
- *Get It Together: Organize Your Records So Your Family Won't Have To*
by Melanie Cullen
- <http://media.familysearch.org/how-to-manage-your-familys-digital-assets/>

So, What's Your Plan?

