

Genealogy Coaching Projects

Ongoing, guided Coaching Sessions for the family historian who loves doing their own research (but still needs help!).

Guided Genealogy Plans

Sometimes, we just need some guidance. Whether you're a beginner or an experienced family historian, our experts provide personalized Monthly Coaching Sessions that empower **you** with the skills and resources to chart your own unique, hands-on genealogy journey.

What is a Coaching Project?

Monthly one-hour, face-to-face video Coaching Sessions with your professional researcher, customized to your specific needs and goals. Our expert guidance, training, and resource recommendations will assist you to:

- Prioritize your research goals
- Stay on task and make steady research progress
- Learn new research skills & methodologies
- Overcome brick walls and jump into complex research challenges with our guidance
- Organize, preserve, and share your genealogy research with FOREVER Storage
- Master proper record-keeping and source citation to ensure accuracy and credibility of your research



How a Coaching Project Works



First Monthly Coaching Session

We will discuss where you are with your research and prioritize your goals, then we will jump into solutions!

The Coaching Session will guide you through research approaches, available resources, and recommended next steps toward the answers. Your research tasks, or "homework," will be identified and discussed. A **Monthly Coaching Summary** will be added to your FOREVER Storage for easy reference.

Client Homework

You will perform the recommended research on your own time before your next Coaching Session, giving you one month to complete the tasks.

Next Monthly Coaching Session

In your next Coaching Session, we will talk through the results of your previous month's homework tasks, assess the records located, and have a discussion of next steps. New homework will be assigned based on the status of each research goal.

Ongoing Project

For the duration of your Project, each monthly Coaching Session will be used to methodically work together through your individual research goals, grow your personal genealogy, and expand your own research skills.

Coaching Projects Include

- **Monthly Coaching Sessions** to discuss that month's research goal and guide research approaches, resources, and next steps
- **Expert Guidance** to help you stay on task, prioritize goals, and learn new skills

- **Monthly Coaching Summary** to detail the discussion, recommendations, and tasks, which is added directly to your permanent FOREVER Account*
- **Training & Resources** to develop new skills to help complete your assigned research tasks

GUIDED GENEALOGY PLANS

Coaching Project Plans

12 Month - Coaching Project

\$115 USD/MONTH

\$115/HOUR

1 HOUR/MO FOR 12 MONTHS

6 Month - Coaching Project

\$120 USD/MONTH

\$120/HOUR

1 HOUR/MO FOR 6 MONTHS

3 Month - Coaching Project

\$125 USD/MONTH

\$125/HOUR

1 HOUR/MO FOR 3 MONTHS



Are you a

FOREVER Club Member?

Save an extra 5% on any Coaching Plan with your CLUB5 discount!



Want to gift one of our Coaching Plans?

Purchase the Plan that works best. You will receive your FOREVER Family Research Welcome Email within two business days.

Let us know that it is a gift. FOREVER Family Research will provide you with a Printable Gift Acknowledgment that can be presented to the lucky person!

Want more Coaching hours per month?

Simply add two Coaching Projects to your cart and check out!
We recommend you do not stack more than two at a time. See FAQs below.

Check out our Service Options online at forever.com/research. If you have questions, contact your FOREVER® Ambassador or our Client Care Team at 1-888-FOREVER (367-3837) or support@forever.com.

PLEASE NOTE: Gift Certificates and FOREVER Club Dollars cannot be used for FOREVER Family Research Projects.

** If you do not already own a permanent FOREVER Account, you will also receive a free introductory FOREVER Account (private web page with organization and sharing capabilities).*

Prices in USD.

General Family Research FAQs

What is the difference between a FOREVER Research Project, a Coaching Project, and a One-Hour Consultation?

- **Research Projects** provide ongoing, full-service genealogy research conducted by our experts and include a FOREVER Family Tree.
- **Coaching Projects** provide ongoing guidance, training, support, and resource recommendations to empower YOU with the skills and resources to chart your unique, hands-on genealogy journey.
- **Consultations** are one-time meetings to discuss a specific brick wall or research challenge.

Can I start a new FOREVER Research or Coaching Project mid-month?

You may purchase a Project at any time! However, the research will begin the full month following your purchase. For example:

Project paid for on:	January 1 st	January 31 st
Project begins:	February	February

Can I take a month off during a FOREVER Research or Coaching Project?

We understand that life happens and you might need to skip a month. We can accommodate this but with a few caveats:

- We cannot pause your billing. Your Project will then be out-of-sync with your billing unless and until we can catch up on those hours.
- We will do our best, depending on staffing, to increase the monthly Research or Coaching time to make up for the missed hours to get your billing back in sync with your Project time. You will not lose out on any hours you have paid for.

Can I extend my FOREVER Research or Coaching Project once it's over?

Absolutely! During the final month of your Project Plan, you will receive an email from the FOREVER Family Research Team with the option to easily renew your Project and continue.

Can I cancel my FOREVER Research or Coaching Project Plan before it's over?

Yes. However, once a paid Project month has begun, it is not possible to cancel or obtain a refund for that specific month. If you decide to cancel the remainder of your subscription, your Project will cease, and you will not be auto-billed for those future months. You can manage your recurring payments by visiting: forever.com/settings/subscriptions.

Can I use FOREVER Gift Certificates or FOREVER Club Dollars toward any FOREVER Family Research services?

Gift Certificates and FOREVER Club Dollars cannot be used for FOREVER Family Research services. However, FOREVER Club Members will save 5% on all FOREVER Family Research payments!

Are any discounts available?

Yes! The more months you commit to in a FOREVER Research or Coaching Project, the lower the monthly cost to you. Plus, FOREVER Club Members save an additional 5% on all FOREVER Family Research services!

How are FOREVER Family Research documents added to my FOREVER[®] Account?

- If you are a permanent FOREVER Cloud Storage Owner with sufficient storage space, we will upload all the records we locate directly into your permanent FOREVER Account for long-term preservation. The process is seamless: we will create a FOREVER Family Research Album in your Account, and each research month, a nested Album will be created and populated with all documents related to your Project for that month.
- If you are not a permanent FOREVER Cloud Storage Owner but have sufficient introductory storage space, we will upload all the records we locate directly into your introductory FOREVER Account. However, until you purchase permanent FOREVER cloud storage, your files are not guaranteed to be maintained and preserved for your lifetime plus 100 years. As soon as you purchase permanent FOREVER cloud storage, everything in your FOREVER Account will be preserved for generations! View permanent FOREVER cloud storage plans at forever.com/preserve-and-share.

- If you don't have enough space to store your documents and records in your FOREVER Account, we recommend you add additional permanent FOREVER cloud storage space to preserve them. If you do not have enough space in your FOREVER Account for your documents, our only option would be to provide via email. Just remember that if these documents are not saved in your permanent FOREVER Cloud Storage Account, they are not guaranteed to be maintained and preserved for your lifetime plus 100 years! View permanent FOREVER cloud storage plans at forever.com/preserve-and-share.

Please note that the documents we upload to your FOREVER Account count toward your permanent FOREVER cloud storage total. Sufficient storage space is required.

Can I gift a FOREVER Family Research service?

Absolutely! A FOREVER Family Research gift can fill in missing generations, add detail to your family's stories, or break through brick walls of previous personal genealogy research. Simply purchase your intended plan or consultation and, once you receive your Welcome Email, let us know that it's a gift. We will provide you with a Printable Gift Acknowledgment that can be presented to the lucky person!

Coaching Project FAQs

What can I expect after I open a new FOREVER Coaching Project?

Your first Coaching Session will be held in the first full month AFTER your purchase of a new Project. For example:

Project paid for on:	January 1 st	January 31 st
Coaching Project begins:	February	February
1 st Coaching Session:	During February	During February
2 nd month billed:	March 1 st	March 1 st
2 nd Coaching Session:	During March	During March

The FOREVER Family Research Team will contact you by email within two business days of your purchase to set up your first Coaching Session. This email will include a form to gather some basic information from you ahead of your first Coaching Session.

To get the most out of this first Coaching Session, we encourage you to:

- Be prepared by gathering any information you may have or any prior research, family trees, pedigree charts or any other work that has been done, to refer to and share.
- Have an idea which family line you might want to begin with.
- If we will begin with an especially complex research problem, consider sending us a summary of this ahead of time to familyresearch@forever.com.

If you are new to genealogy and will be using your Coaching Project to start from scratch, that is fine, too! But come to your first Session with basic family details and an idea of which family line you want to begin with.

What is required of me in a Coaching Project?

Our experts will meet with you for one hour per month to provide professional genealogy guidance, training, and resource recommendations.

What is required of you each month:

- Time for your one-hour Coaching Session each month, during usual business hours.
- Time to fulfill your assigned research tasks each month. A suggested minimum of 5 hours per month should be available to devote to your personal research. If your actual available time is more or less than 5 hours per month, we can limit or expand your monthly research goals accordingly.
- Some records are freely available, some are behind paywalls, and some are not available at all! Access to certain subscription databases might be needed to accomplish your research tasks. We will discuss this at your first Coaching Session and as needed throughout your Coaching Project.

How does Coaching work for beginner, intermediate, or experienced levels of genealogy research?

Coaching is customized to you, your experience level, and your ultimate goals. We can work with anyone, regardless of your skill level, as long as you have the enthusiasm and time to complete your assigned research tasks each month.

Can I pay to receive more than 1 hour of Coaching per month?

Yes! Plans are stackable to add more time and can be used as either:

- one 2-hour Coaching Session per month or
- two 1-hour Coaching Sessions per month

However, we recommend that no more than two Coaching Projects be stacked together so you have enough time to complete your homework each month before your next Coaching Session!

Does a Coaching Project include any research done by the professional FOREVER Genealogists?

Yes and No. We might perform some genealogy searches with you during a Coaching Session, but our main goal with this service is to empower YOU with the skills and resources to perform successful research and locate records.

Coaching Project time cannot be used as a substitute for a Research Project which involves full-service, expert genealogy research.

Can I use a Coaching Project to learn how to utilize my DNA test results?

Yes. However, DNA interpretation is a very time-consuming and involved process. We do not recommend this goal with a 3-Month Coaching Project.

Can a Coaching Project and a full-service Research Project run at the same time?

Absolutely. We can run a Coaching Project while also doing a full-service Research Project on OTHER family lines or goals. This is ideal for someone who wants to work on a specific problem while still making progress with our experts in other, more challenging areas.

Can a Coaching Project be transferred into a Research Project?

Genealogy is not always easy, or your time to complete your research tasks might become an issue. If you decide to move to a full-service Research Project, you will need to book a new Research Project. We will add your remaining Coaching Project months onto the new Research Project months. This means your Research Project would be a total of 5 hours + 1 hour per month for the number of months remaining on your Coaching Project.

Do you have other questions?

Contact the FOREVER Family Research Team at familyresearch@forever.com.