

# CODE OF ETHICS

- 1** Promote a coherent, truthful approach to genealogy, family history and local history.
- 2** Present research results and opinions in a clear, well-organized manner; fully and accurately cite references; and refrain from withholding, suppressing, or knowingly misquoting or misinterpreting sources or data.
- 3** Promote the trust and security of genealogical consumers.
- 4** Advertise services and credentials honestly, avoiding the use of misleading or exaggerated representations; explain without concealment or misrepresentation all fees, charges, and payment structures; abide by agreements regarding project scope, number of hours, and deadlines and reporting schedules; keep adequate, accessible records of financial and project-specific contacts with the consumer; and refrain from knowingly violating or encouraging others to violate laws and regulations concerning copyright, right to privacy, business finances, or other pertinent subjects.
- 5** Support initiatives that preserve public records and access to them.
- 6** Be courteous to research facility personnel and treat records with care and respect; support efforts to locate, collect, and preserve the records by compiling, cataloging, reproducing, and indexing documents; refrain from mutilating, rearranging, or removing from their proper custodians printed, original, microfilmed, or electronic records.
- 7** Promote the welfare of the genealogical community.
- 8** Give proper credit to those who supply information and provide assistance; refrain from (or avoid) knowingly soliciting established clients of another researcher; encourage applicable education, accreditation, and certification; and refrain from public behavior, oral remarks or written communications that defame the profession, individual genealogists, or the Association of Professional Genealogists.

# CODE OF ETHICS



Maintaining Professional Standards  
in a Diverse Community



# Why the Code?

The Association of Professional Genealogists has a responsibility to serve both its diverse membership and the genealogical client community. The significance of ethics to APG and its members is reflected in the manner in which complaints are processed and resolved.

When a violation of this Code is alleged, it will be reviewed and investigated if the Professional Review Committee determines it meets all the criteria for such action.

The complaint and disciplinary procedures accomplish five things:

- ✓ Maintain high professional standards
- ✓ Increase consumer confidence
- ✓ Provide a fair process for handling complaints against members
- ✓ Identify members who will benefit from additional training
- ✓ Identify those committing serious violations of the Code of Ethics

## Who can file a complaint?

- ▶ Clients who believe a member has not performed as expected or has failed to complete a genealogical service (research report, seminar, etc.). A client is any individual with whom a current member in good standing has an agreement in writing, i.e., letters, emails, or formal contracts.
- ▶ Individuals who are not clients, but who have evidence that the member, in day-to-day genealogical business practices, brings discredit to the profession of genealogy.
- ▶ Any APG member who has evidence that another member is participating in unethical or criminal activity that reflects poorly upon APG as an organization.
- ▶ The Professional Review Committee (PRC) or the APG Executive Committee if either becomes aware that the activity of any member reflects poorly upon APG as an organization.

## What we won't review

- ▶ Allegations concerning verbal agreements between a member and another party.
- ▶ Allegations against a member for non-genealogical business agreements such as non-payment of rents or other general business not directly related to genealogical client agreements.
- ▶ Allegations of a personal nature not related to genealogical activity.
- ▶ Allegations relating to activity that occurred more than twelve months prior to the date of the complaint, whether or not the accused individual's membership has lapsed.
- ▶ Allegations against an individual based solely on his/her position in a corporation unless the complainant can show that the alleged problem is directly attributable to the action of the member.

## If you believe an APG member has violated this code

- 1 Contact the office of the Executive Director (ED) through email or postal mail to request an official Complaint Form. The form also can be printed from the APG website. Return the completed form to the APG office via email or postal mail. Include copies of written agreements, records of payment, emails or other correspondence, and any other items that will help the Professional Review Committee (PRC) understand your complaint against the member.
- 2 The ED will convey the materials to the PRC and it will determine whether the matter meets the criteria required for a review.
- 3 The ED will advise the complainant whether or not the PRC accepts the issue for formal review. At this point the member will be advised of your complaint and will be asked to respond through the ED to the PRC.

## After the investigation

When the PRC concludes its review, it will be given one of the following final disposition classifications:

- ▶ Presents a solution to the dispute that is agreeable to both sides. Comes down in favor of the complainant and sets out the disciplinary action and/or how the member can rectify the situation.
- ▶ Comes down in favor of the member and sets out why the complaint will not be upheld.
- ▶ Reaches no conclusion due to lack of concrete evidence or other extenuating circumstances.