



The Genealogist Workflow

Reference Guide for Evidence-Based Family Research — Print Edition

By Gary Katz

Professional Genealogist and
Genetic Genealogy Detective

Genealogy Gary

<https://genealogygary.com>

March 2026

Inside This Guide

The Genealogist's Workflow: How I Turn Family Mysteries into Ancestral Discoveries	3
Building the Tree Foundation: How to Turn Family Stories into a Solid Research Base	8
Verifying the Family Chronicle: How to Turn Family Lore into Proven History	14
Surfacing Living Cousins: How to Find and Connect with Relatives Who Hold Missing Pieces of Your Family Story	18
Experimenting with Big Puzzles — How to Use Hypothetical Trees to Break Through Genealogical Brick Walls	23
Deep Diving into DNA — How to Turn Genetic Data into Ancestral Discovery	28
Publishing for Posterity — How to Share and Preserve Your Family Research for Future Generations	35
Connecting the Dots through Collaboration — How to Partner with Other Genealogists to Accelerate Discovery	39
Hunting for Random Nuggets — How to Find Unexpected Clues When You Hit a Genealogical Brick Wall	43
About the Author	47
About Genealogy Gary	47

The Genealogists Workflow: How I Turn Family Mysteries into Ancestral Discoveries

Originally published December 3, 2025



By Gary Katz, Professional Genealogist & Genetic Genealogy Analyst

I've traced families across oceans, confirmed whispered rumors of name changes, and uncovered entire branches hidden for generations. Over time, I realized that even the most complex cases follow a familiar rhythm — one that blends evidence, intuition, DNA, and collaboration.

That rhythm became the backbone of what I now call my Evalu8 Genealogy Workflow.

It's a methodical yet flexible system that guides both traditional research and genetic genealogy (DNA analysis). Evalu8 reflects how discoveries really happen: one question leads to another, one record unlocks the next, and one unexpected DNA match can reframe an entire family story.

★ The Evalu8 Workflow of Professional Genealogical Research

Evalu8 is my signature genealogical workflow system. What makes it unique is its flexibility. You can run it linearly when building or repairing a family tree — or non-linearly when diving into a complex puzzle, following a DNA lead, or testing a family story. Each objective stands on its own, yet together they create a complete 360° approach to modern genealogy.

Most genealogy isn't linear.

Your framework shouldn't be either.

The Evalu8 framework adapts to the researcher, the question, and the evidence.

1. Building the Tree Foundation

Goal: Establish a reliable, evidence-supported base that every later discovery depends on.

Begin by grounding yourself in what's already known — or thought to be known. Conduct interviews with older relatives and branch genealogists, collect oral histories, and build out a foundation tree using tools like Ancestry, FamilySearch, MyHeritage, Geni or WikiTree.

This foundation tree is more than a chart of names; it's a working hypothesis, ready to be strengthened or corrected as new evidence emerges.

This is the moment clients love: when vague family memories begin to take shape as real, documented history.

2. Verifying the Family Chronicle

Goal: Transform family lore into documented, evidence-based history.

Family stories often mix truth, assumption and embellishment. Verification is where hypotheses become history. This stage includes confirming ancestors' vital events through:

- Birth, marriage and death certificates
- Censuses and residence records
- Immigration and naturalization files
- City directories and newspaper archives
- Personal papers and cemetery inscriptions

3. Surfacing Living Cousins

Goal: Expand the research network and uncover privately held family materials.

The living can often illuminate the past. By identifying and connecting with cousins and descendants of collateral lines, you can gather new information, photos and documents long hidden in private albums or attics.

Social media, people-finder databases and respectful outreach reveal branches of the family tree no one realized still existed.

This stage requires diplomacy as much as data — and it often pays off in remarkable ways.

4. Experimenting with Big Puzzles

Goal: Test hypotheses creatively while maintaining rigorous documentation.

Some mysteries resist straightforward methods: unknown parents, inconsistent records, mid-century name changes, shifting borders.

Here, you build experimental tree branches — hypothetical structures that test theories without prematurely committing to them. Tools like:

- Ancestry ThruLines
- MyHeritage's Theory of Family Relativity

...help generate possibilities while keeping unverified hypotheses clearly labeled.

This experimental mindset keeps research agile, curious and open to surprise.

5. Deep Diving into DNA

Goal: Use genetic evidence to confirm, refine, or challenge existing paper trails.

DNA has revolutionized genealogy, offering clues that can validate generations of research — or overturn long-accepted assumptions. Using autosomal, Y-DNA and mitochondrial DNA across platforms like:

- AncestryDNA
- 23andMe
- MyHeritage DNA
- FamilyTreeDNA
- GEDmatch

You analyze match clusters, inheritance patterns, and chromosome maps to identify likely common ancestors.

Genetic genealogy is both science and art — interpreting centimorgans, mapping triangulated segments, and using tools like DNA Painter or Genetic Affairs to visualize biological connections that paper records alone can't reveal.

6. Publishing for Posterity

Goal: Transform research into lasting, shareable work that attracts collaboration.

Good research deserves to be shared — and preserved. Publishing can include:

- Narrative reports
- Ancestor biographies
- Family trees and GEDCOM uploads
- Visual charts and storybooks
- Digital scrapbooks or “family story” PDFs

Publication doesn't just honor the past. It helps future cousins find you, and it closes the loop between evidence, analysis, and storytelling.

7. Connecting the Dots Through Collaboration

Goal: Multiply discovery potential by tapping into the broader research community.

Genealogy is not a solo sport. Members of genealogical societies, regional groups, surname projects, and DNA clusters often hold pieces of your puzzle. Working with others researching the same surnames, towns or families accelerates discovery and deepens context.

From JewishGen SIGs to Geni collaborative trees, shared research broadens what any person can uncover alone.

8. Hunting for Random Nuggets

Goal: Spark breakthroughs through creative, nonlinear exploration.

When you hit a brick wall (or simply need inspiration), this is where serendipity takes over. Search laterally:

- Neighbors and in-laws
- Old newspapers and yearbooks
- Memorial plaques
- Local archives and obscure databases
- Foreign-language search terms

Some of the most satisfying discoveries happen here — when a stray clue suddenly unlocks a long-stubborn mystery.

★ A Philosophy of Evidence, Curiosity, and Connection

These eight objectives form a dynamic, integrated workflow — not a strict sequence, but a living cycle. New DNA evidence may send you back to verification; a newly discovered cousin may require revisiting your foundation tree.

What binds it all together is a commitment to evidence-based storytelling:

- Start with what's known
- Test what's assumed
- Document what's proven
- Share what's discovered

Genealogy is more than collecting names. It's about understanding people in context — their migrations, choices, hardships and triumphs. DNA and digital tools have expanded what's possible, but the heart of genealogy remains the same: curiosity, empathy and persistence.

📖 What's Ahead in This Series

In the upcoming articles, I'll explore each objective in depth, including:

- How to structure your tree for long-term reliability
- How to evaluate evidence across record types
- How to connect meaningfully — and ethically — with DNA matches
- How to collaborate and publish in ways that attract new discoveries

Whether you're a hobbyist ready to professionalize your process or an experienced researcher looking for new strategies, this series will help you work more effectively — and enjoy the detective work along the way.

Because in genealogy, the past isn't behind us.

It's alive in every record we find, every cousin we meet, and every story we bring back to life.

👉 Next in the Genealogy Workflow:

Building the Tree Foundation: How to Turn Family Stories into a Solid Research Base

Building the Tree Foundation: How to Turn Family Stories into a Solid Research Base

Originally published December 18, 2025



Family conversations and shared memories are often the starting point for oral history research.

By Gary Katz, Professional Genealogist and Genetic Genealogy Analyst

Every professional genealogy project begins with careful documentation and context.

Every genealogy journey begins long before a record search or DNA test — it begins with stories. Fragments of memory, family lore, and half-remembered details form the raw material of nearly every research project I take on.

In the first article of this series, I introduced the professional genealogy workflow and explained why a structured process is essential for turning family mysteries into documented conclusions. This article moves from theory into practice by focusing on the very first hands-on step: building a stable foundation tree that can support every record search, DNA analysis, and conclusion that follows.

In this article, you'll learn how to:

- Turn family stories into a structured research foundation
- Capture oral history before record searches and DNA analysis
- Choose effective tools for building a reliable family tree
- Organize, cite, and evaluate your work like a professional genealogist

Every Great Genealogy Project Begins with a Story

Nearly every client project I take on starts the same way: with a conversation that begins, “My grandfather used to tell this story...”

Family history often lives in fragments — in stories told around a dinner table, old photos in a shoebox, or handwritten notes on the back of a postcard. Before a single record search or DNA test, the first step of professional genealogy is to capture those fragments and begin shaping them into a structured, sourced family tree.

This is what I call Building the Tree Foundation — the essential first objective in my professional genealogy workflow.

The goal isn't perfection or completeness. It's stability — a reliable framework that will hold up as new discoveries and DNA evidence come in.

Why the Foundation Matters

Your family tree isn't just a chart — it's a working hypothesis. Every name, date, and connection represent an assertion that can (and should) be tested.

Without a well-organized starting tree, you'll quickly find yourself lost in circular searches, duplicate records, or mislinked families — common traps for even experienced researchers.

- A reference map for every research question you ask later
- A shared framework you can publish or collaborate on
- A verification baseline for evaluating DNA matches

Think of it as the scaffolding that lets the rest of your genealogical research stand tall and stable.

Step 1: Start with the Living — and Listen Deeply



Family conversations and shared memories are often the starting point for oral history research.

Your most valuable sources aren't in archives; they're sitting at family tables.

Start by interviewing the oldest known relatives. Let them speak freely — and don't worry about verifying or correcting their recollections yet. You're capturing raw data, emotional context, and clues.

- “Who do you remember most from your childhood?”
- “Did anyone in the family come from another country?”
- “Are there old family photos, letters, or documents you've kept?”

Then, expand your scope to include branch genealogists — cousins or relatives who've already started their own trees on Ancestry, MyHeritage, or FamilySearch.

Step 2: Choose Your Tree-Building Platform Wisely



Digital platforms turn family stories into structured, searchable research.

Once you have names, stories, and family clusters, the next step is to build your initial tree digitally. Following are some best-in-class genealogy tools to consider:

Platform Type	Examples	Best For
Online Genealogy Sites	Ancestry, FamilySearch, MyHeritage, WikiTree	Collaboration and cousin discovery
Desktop Software	Family Tree Maker, RootsMagic, Reunion, Gramps	Data control and professional citation

Step 3: Build Outward from Yourself – Carefully

This step establishes accuracy and prevents errors from compounding as your tree grows.

Start with yourself, then move outward generation by generation. Add only what you know with confidence, and mark unverified information clearly.

- Record full names and spelling variants
- Include locations for life events
- Use approximate dates when needed
- Maintain consistent place naming

Step 4: Organize, Cite, and Sync



Clear organization and citations form the backbone of professional genealogy.

Every fact should have a source. Even simple citations provide crucial provenance and future-proof your research.

Step 5: Enrich the Tree with Context and Media



Recorded interviews, photos, and documents add depth and context to a family tree.

Photos, letters, certificates, and audio recordings add depth and meaning to your tree.

Step 6: Collaborate Early and Transparently

Collaboration works best when expectations and evidence are clearly defined from the start. Share your work early, label hypotheses clearly, and invite collaboration.

Step 7: Step Back — and Evaluate Your Foundation

This is where you shift from building to critical evaluation.

You're not aiming for perfection — just a foundation strong enough to support confident future research.

Building a Tree Is Like Framing a Story

When you build your foundation tree, you're framing a narrative that will guide every future discovery.

Next in the Genealogy Workflow:

Verifying the Family Chronicle — How to Turn Family Lore into Proven History

Verifying the Family Chronicle: How to Turn Family Lore into Proven History

Originally published December 26, 2025



Close examination of historical records often reveals the subtle clues that break genealogical brick walls.

By Gary Katz, Professional Genealogist & Genetic Genealogy Analyst

Once family stories have been gathered and organized, the next critical step is verifying what can be proven.

Every family has its “chronicle” — a blend of truth, memory, and myth passed down through generations.

A grandmother’s recollection of “coming from Russia,” a story about “a great-uncle who changed his name at Ellis Island,” or the mysterious “missing branch” that no one talks about — these are the sparks that ignite genealogical discovery.

From Family Stories to Verified History

But as every professional genealogist learns quickly, stories are clues, not evidence. The second objective of my professional genealogy workflow — Verifying the Family Chronicle — is about transforming family lore into fact. It's where we replace speculation with documentation and turn oral tradition into a record-based history.

Why Verification Is Essential

Verification isn't just about checking facts — it's about building confidence in your research.

- Ensure that your tree reflects real people who can be documented.
- Catch and correct generational errors and mistaken identities.
- Build a research trail that others can reproduce and expand.
- Strengthen DNA analysis results by grounding matches in proven relationships.

Professional genealogy rests on what's called the Genealogical Proof Standard (GPS) method that emphasizes thorough research, accurate source citation, and logical conclusions supported by evidence. Good genealogy is transparent, traceable, and testable.

Step 1: Start with Known Facts, Not Assumptions

Before diving into new searches, collect and review all existing evidence, family documents, previous research, oral histories, and tree entries.

- Which facts are backed by documents?
- Which are based solely on memory or hearsay?
- Are there discrepancies between sources?

Mark unverified details clearly (for example, "said to be born in Poland, per family tradition") until confirmed. This habit of labeling uncertainty is a hallmark of credible genealogy.

Step 2: Use Vital Records as Cornerstones

Vital records — birth, marriage, and death certificates are the bedrock of genealogical verification. They provide names, dates, places, and often parents' identities.

Where to Find Them

Ancestry.com and MyHeritage.com

FamilySearch.org

Reclaim the Records

Municipal and state archives

Verification Tip:

When names vary across records, use a cluster of consistent details — age range, spouse, occupation, residence to confirm identity. Focus on patterns, not perfection.



Family photographs and archival documents together preserve the stories that transform names on a chart into real ancestral lives.

Step 3: Confirm through Government Documents

Vital records tell you who and when. Government documents often tell you where, how, and why.

Census records, military files, land deeds, immigration and naturalization papers, probate records, and court documents frequently provide the connective tissue linking generations when vital records alone fall short.

Step 4: Leverage Published and Personal Sources

City directories, newspapers, books, family Bibles, letters, postcards, diaries, and yearbooks can all support or refine your findings.

Step 5: Verify through Religious and Burial Records

Church, synagogue, and cemetery records often predate civil registration and preserve otherwise lost information.

Step 6: Evaluate Evidence and Resolve Conflicts

When evidence conflicts, evaluate each source's originality, informant reliability, and proximity to the event. Document unresolved conflicts transparently.

Step 7: Document, Cite, and Store

Always record where every fact came from. A tree without citations is speculation; a tree with them is history.

Verification Is the Genealogist's Compass

Verification is not a single step — it's a habit of mind. When you document a story with solid evidence, you transform family memory into family history.

Next in the Genealogy Workflow

Surfacing Living Cousins — How to Find and Connect with Relatives Who Hold Missing Pieces of Your Family Story

Surfacing Living Cousins: How to Find and Connect with Relatives Who Hold Missing Pieces of Your Family Story

Originally published January 9, 2026



Historical records, family photographs, and modern research tools combine to help uncover living cousins and preserve family stories.

By Gary Katz, Professional Genealogist & Genetic Genealogy Analyst

Once we have a family history foundation in place, the next step is to shift our attention from records to the people who may still be carrying pieces of the story forward — living cousins.

Genealogy isn't just about the past — it's also about the people who carry that past into the present.

While documents and DNA help reconstruct ancestral lines, living cousins often hold the key to unlocking the personal side of family history: photographs, letters, oral stories, and family lore that never made it into public archives.

In the fourth objective of my professional genealogy workflow — Surfacing Living Cousins — we turn our focus from the deceased to the living. The goal: to locate, engage, and learn from relatives who can fill in the blanks.

Every living cousin is a potential archivist of family truth.

Step 1: Begin with Known Connections

Before diving into the open web, start with what you already have. Your verified family tree gives you a factual backbone for cousin hunting.

- Who in the current tree has descendants you haven't yet traced?
- Which branches of the family go quiet after a certain generation?
- Do you have DNA matches whose trees intersect with yours?

Even a single lead — a surname, a location, a birth year — can point you toward an entire living line.

Cousin-finding starts not with a search engine, but with your own tree.

Step 2: Use Data Aggregators to Locate Potential Relatives



Traditional genealogical records paired with modern people-search tools can reveal living relatives connected to known family lines.

Modern people-search tools are powerful allies when used responsibly and ethically. These databases consolidate public information — addresses, phone numbers, social media links, and known relatives — into one searchable interface.

Recommended Aggregators

- BeenVerified
- Intelius / ZabaSearch
- FastPeopleSearch
- TruePeopleSearch

Pro Tip: Always cross-check aggregator data against genealogical context. Never assume a match based on surname alone.

Step 3: Leverage Social Media Profiles

Social platforms function like modern census records — public, relational, and searchable.

Key Platforms

- Facebook: Extended family networks and location clues
- LinkedIn: Professional and international connections
- Instagram: Younger generations and visual confirmation

When reaching out, lead with transparency. Explain who you are, how you may be connected, and why you're reaching out.

Step 4: Use DNA Matches Strategically



DNA match networks and shared-match clusters help identify living cousins linked through common ancestors.

DNA platforms have revolutionized cousin discovery. Every match is a potential collaborator — a living link to a shared ancestor.

Where to Start

- AncestryDNA
- MyHeritage DNA
- FamilyTreeDNA
- 23andMe
- GEDmatch

Action Plan

- Sort matches by centimorgan (cM) range
- Group shared matches into clusters
- Identify overlapping surnames and locations
- Reach out respectfully through platform messaging

You're not cold-calling strangers — you're introducing yourself to kin.

Step 5: Google Is Still Your Best Friend

Search engines remain incredibly powerful when paired with creative logic.

“Firstname Lastname” + birthplace + genealogy

“Lastname” + obituary + city

“Lastname” + reunion + Facebook

“Surname” + “descendants of” + ancestor

Use Google Advanced Search to narrow by domain or file type.

Step 6: Respect Privacy and Build Trust

Ethics matter when working with living relatives.

- Obtain consent before sharing personal details
- Keep first contact simple
- Don't assume interest
- Honor boundaries

Many of my most valuable collaborations began with a single respectful message.



Connecting with living cousins often begins with thoughtful outreach and a shared respect for family history and privacy.

Step 7: Build Collaborative Networks

Once contact is established, the goal becomes collaboration.

- Share trees on Ancestry or MyHeritage
- Create private family groups
- Use shared folders for photos and documents
- Encourage story-sharing and oral histories

Collaboration turns genealogy into a living tradition.

Step 8: Record and Cite Every Connection

Living cousin discoveries belong in your research log:

- Full name
- Estimated relationship
- Date and method of contact
- Information shared (with permission)

You're building a relationship archive, not just a tree.

The Living Links That Complete the Story

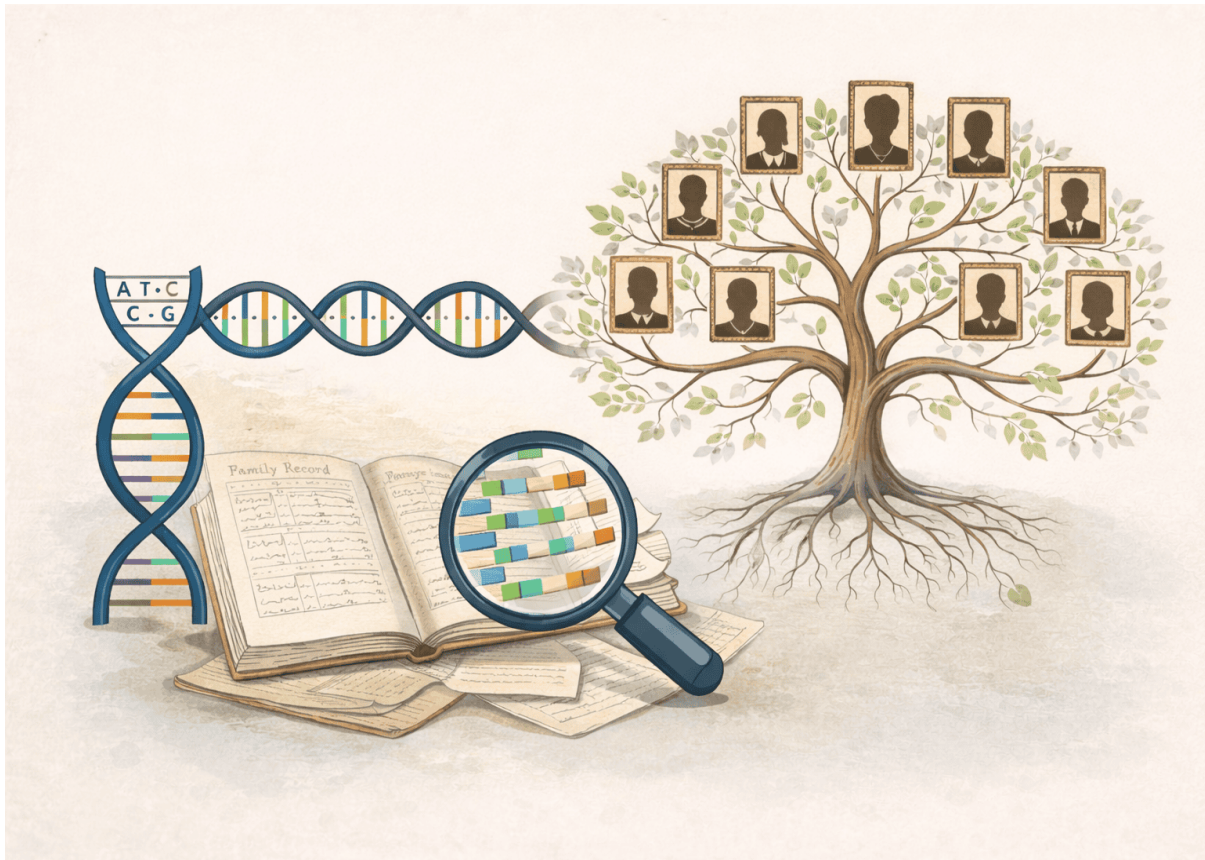
When you connect with living cousins, you restore voices to your family narrative. Every family has historians waiting to be awakened — they just don't know it yet.

Next in the Genealogy Workflow

Experimenting with Big Puzzles — How to Use Hypothetical Trees to Break Through Genealogical Brick Walls

Experimenting with Big Puzzles — How to Use Hypothetical Trees to Break Through Genealogical Brick Walls

Originally published January 16, 2026



Hypothetical family trees allow genealogists to explore multiple ancestral possibilities without compromising verified research

By Gary Katz, Professional Genealogist & Genetic Genealogy Researcher

By the time a genealogist reaches this stage of research, much of the foundational work has already been done.

The overall framework has been established in *The Genealogist's Workflow*, where I outlined how professional genealogy research moves from question to evidence-based conclusion.

Family stories and inherited information were organized into a coherent structure in *Building the Tree Foundation*, creating a working tree designed for analysis rather than assumption.

Those stories were tested against historical records in *Verifying the Family Chronicle*, where contradictions were resolved, and unsupported claims set aside.

And the focus expanded beyond records alone in *Surfacing Living Cousins*, by identifying and engaging living relatives who may still carry pieces of the family story forward.

Yet even with a solid tree, verified documentation, DNA evidence, and collaborative connections, some ancestral questions remain stubbornly unresolved.

This is the point where many genealogists stall — uncertain how to move forward without compromising the integrity of their verified work.

Experimenting with Big Puzzles explores what happens next. It introduces a disciplined way to test possibilities using hypothetical trees — provisional structures that allow genealogists to explore competing theories, evaluate DNA-driven clues, and eliminate false leads without contaminating proven research.

Used responsibly, experimental trees are not guesswork or shortcuts. They are a controlled environment for asking better questions — and for breaking through genealogical brick walls that records, DNA, and collaboration alone cannot yet solve.

The Art and Science of the Hypothesis Tree

Every genealogist eventually hits the wall: that immovable barrier where records vanish, surnames shift, or a common ancestor refuses to reveal themselves.

At this stage, traditional verification alone isn't enough. You must think like a detective — testing multiple possible scenarios until one fits the evidence.

That's where the Big Puzzle approach comes in: building experimental trees — carefully marked, provisional branches that allow you to test hypotheses, identify false trails, and ultimately solve genealogical mysteries.

An experimental tree isn't guesswork — it's structured imagination, clearly labeled and continuously tested against evidence.

Step 1: Know When to Build an Experimental Tree

An experimental tree is useful when:

- You've exhausted standard records and can't confirm the next ancestor.
- DNA matches point to multiple potential relationships, but documentation is unclear.
- You're dealing with common surnames or overlapping families in a small geographic area.
- You suspect a name change, adoption, or cultural shift in identity.

Rather than forcing unverified individuals into your main tree, build a separate experimental tree — a controlled space for testing relationships.

Step 2: Use DNA Clues as Your Compass



DNA match patterns often guide experimental genealogy research, surfacing possible relationships that must still be tested and verified

DNA is often what sparks a Big Puzzle investigation.

High shared matches with missing connections hint that your known tree is incomplete.

Action Plan

Start with high DNA matches whose trees overlap geographically or by surname.

- Identify patterns across multiple matches.
- Create a hypothetical connection linking your ancestor to the suspected family.
- Test the hypothesis against additional matches and records.

DNA gives you the puzzle pieces — but the experimental tree is where those pieces can be tested safely without corrupting your verified lineage.

Step 3: Build Your Experimental Tree Transparently

Create experimental branches on a separate tree, clearly labeled as hypothetical or under research.

Ancestry: Use tags such as “Hypothesis” or “Unverified.”

MyHeritage: Apply color-coded labels or detailed notes.

Desktop software: Maintain a separate experimental project.

Transparency distinguishes a scientific genealogist from a speculator.

Step 4: Use Genealogy Site Algorithms as Research Partners



Genealogy platform algorithms can suggest ancestral connections

Modern genealogy platforms provide powerful tools for hypothesis generation — not proof. Algorithms should suggest. Genealogists must decide.

Step 5: Apply the Genealogical Scientific Method

- Form a clear research question.
- Develop a testable hypothesis.
- Evaluate evidence objectively.
- Refine or discard the hypothesis.

Treat your tree like a laboratory, not a shrine — and document every experiment, not just the successes.



Collaboration helps genealogists test hypotheses, uncover blind spots, and strengthen conclusions through shared analysis.

Step 6: Collaborate to Validate Hypotheses

Collaboration accelerates discovery and prevents tunnel vision.

Step 7: Document Failed Hypotheses Too

In professional genealogy, disproving a theory is as valuable as proving one.

Negative evidence, properly logged, is a map of where not to dig again.

Step 8: Know When to Merge Hypotheses into Proven History

Once multiple sources converge — records, DNA, and logic — hypotheses may be integrated into the verified tree with full annotation.

The Freedom to Imagine — Responsibly

The most creative genealogists are not reckless — they're rigorously imaginative.

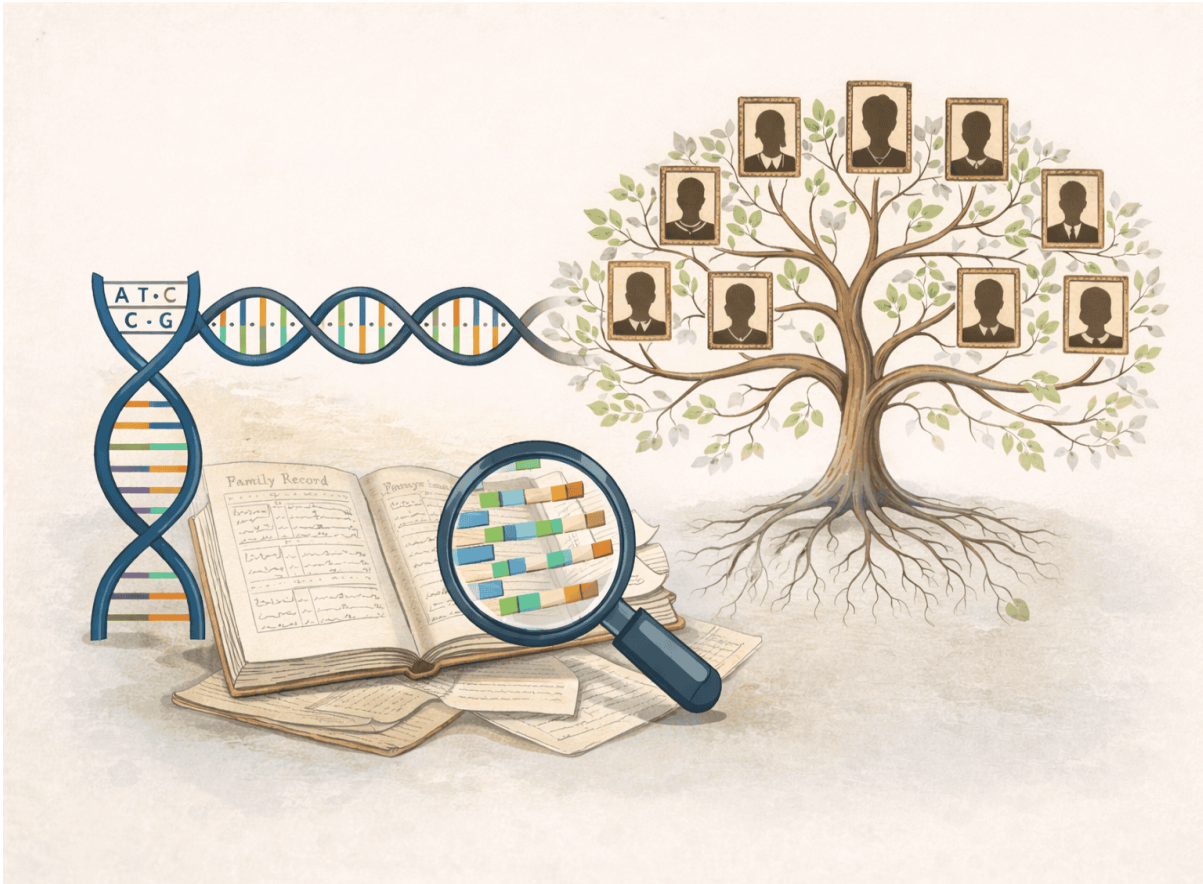
By balancing experimentation with discipline, genealogists transform roadblocks into discoveries.

Next in the Genealogy Workflow

Deep Diving into DNA: How to Turn Genetic Data into Ancestral Discovery

Deep Diving into DNA — How to Turn Genetic Data into Ancestral Discovery

Originally published on January 23, 2026



DNA evidence integrated with documentary research helps reconstruct ancestral relationships.

By Gary Katz, Professional Genealogist & Genetic Genealogy Analyst

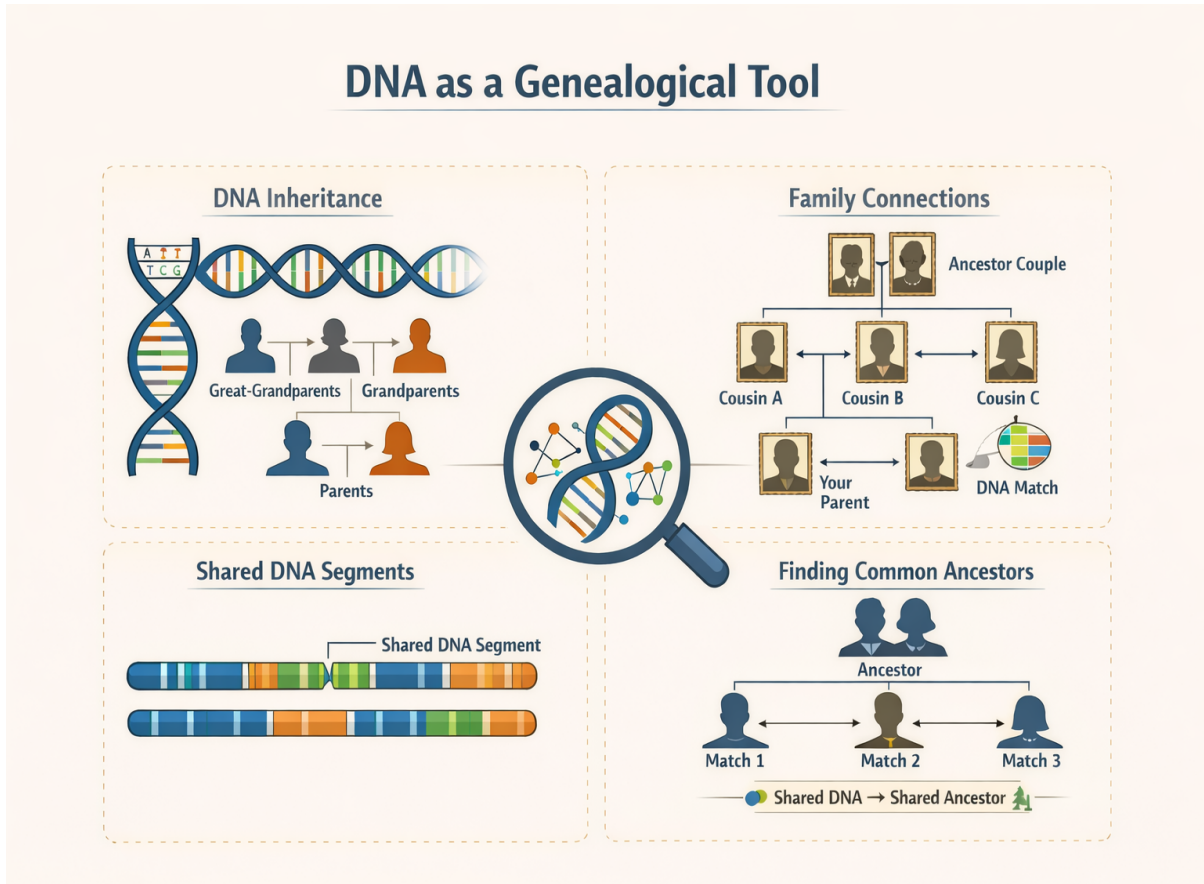
At a certain point, documents thin out. Memories fade. Records disappear, were never created, or were destroyed by war, migration, or bureaucracy. When that happens, traditional genealogy alone can only take you so far.

This is where DNA becomes indispensable.

Not as a novelty . . . Not as a shortcut . . . And certainly not as a list of ethnicity percentages.

With the fifth objective of my genealogy workflow — Deep Diving into DNA — genetic evidence is used the same way all good evidence should be used: cautiously, methodically, and in direct conversation with the paper trail. DNA does not replace documents. It strengthens them, challenges them, and in many cases extends them into places the records can no longer reach.

From Spit to Story: What DNA Can Really Tell You



DNA evidence links living individuals to shared ancestral lines when records fall silent.

DNA reveals relationships between living people, which genealogists use to infer shared ancestors when records are incomplete or missing.

It's easy to think of DNA testing as entertainment — the quick way to learn you're "32% Baltic" or "12% Scandinavian."

Those estimates can be interesting, but they are not genealogy.

For genealogists, DNA is a relational record. It documents how living people are biologically connected through shared ancestors, even when names, places, and paperwork have been lost. Its real power emerges only when you move past ethnicity and begin analyzing shared DNA segments, match networks, and triangulated relationships.

Used correctly, DNA can:

- Confirm or refute documentary conclusions
- Identify previously unknown family branches
- Reconstruct ancestral lines erased from the written record
- Reveal which hypotheses are plausible — and which are not

DNA is genealogy's most personal record — written in every one of us — but like any record, it only speaks clearly when interpreted in context.

Step 1: Choose the Right DNA Platforms

Each DNA testing service has unique strengths. Professional genealogists often test or upload results across several platforms to maximize matches.

AncestryDNA — Largest database and strong tree integration

MyHeritage DNA — Strong European coverage and chromosome tools

FamilyTreeDNA — Y-DNA and mtDNA testing with advanced analysis

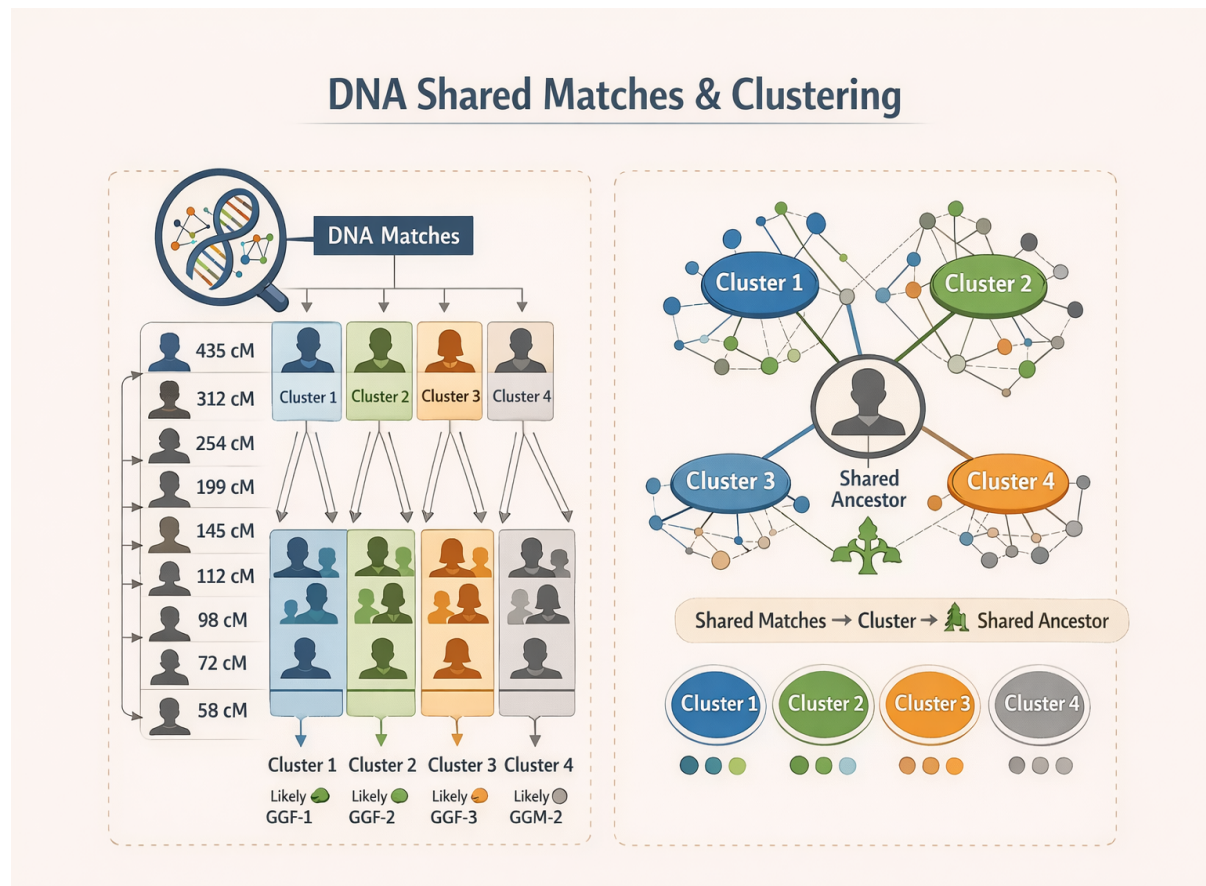
23andMe — Detailed segment data and haplogroups

GEDmatch — Cross-platform comparison and analysis

LivingDNA — British Isles specialization

For serious research, begin with AncestryDNA, then transfer your raw DNA file to additional platforms to broaden your match pool.

Step 2: Start with Shared Matches, Not Ethnicity



Shared DNA matches form clusters that point to common ancestral lines rather than isolated relationships.

Shared DNA matches form clusters that point to common ancestral lines rather than isolated relationships.

Ethnicity percentages are conversation starters, not genealogical evidence.

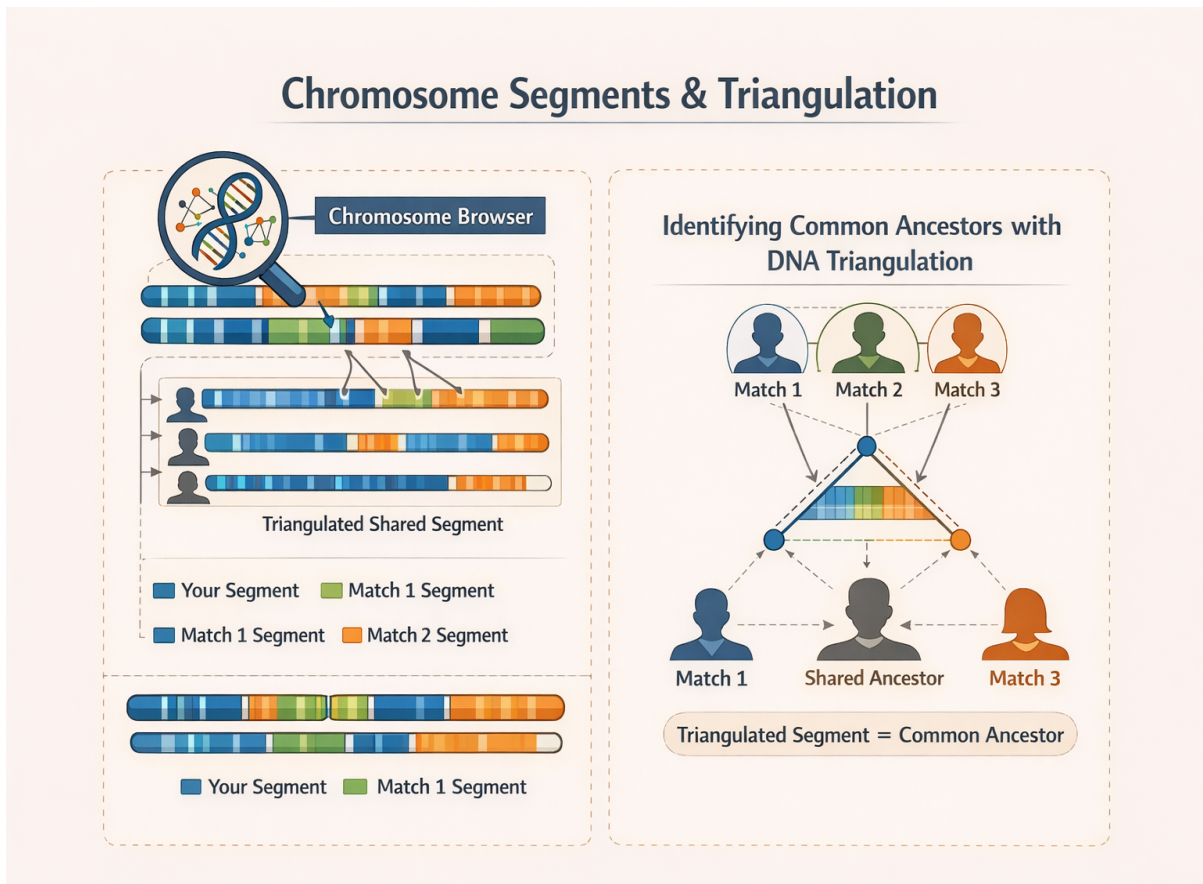
To turn DNA into discovery, focus on shared matches — the people who share overlapping DNA segments with you.

Action Plan

- Sort matches by total shared centimorgans (cM)
- Group matches by likely relationship range
- Look for repeating surnames or locations
- Use shared-match tools to reveal relationship networks

Shared matches point to shared ancestors — your task is to determine who they are.

Step 3: Use DNA “Super Tools” to Analyze and Visualize



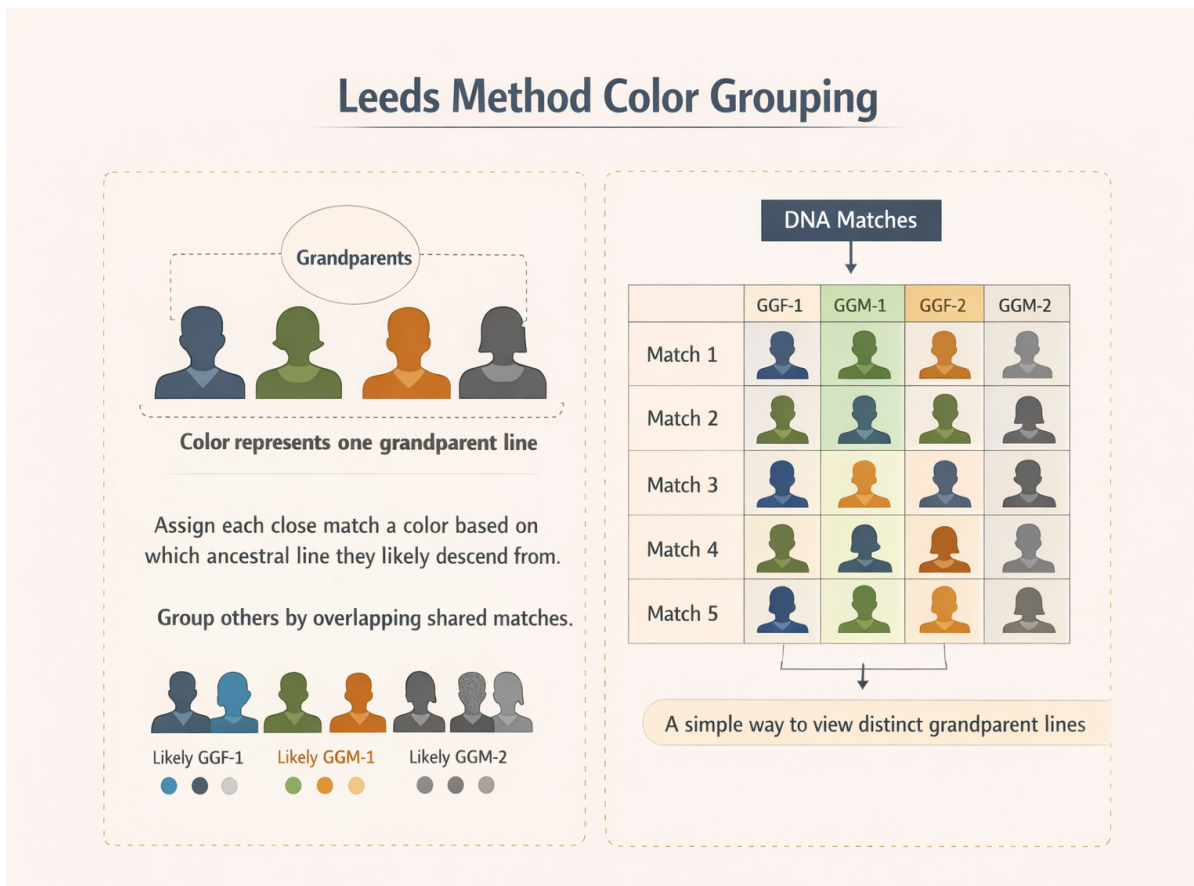
Triangulated DNA segments shared by multiple matches indicate inheritance from a common ancestor rather than coincidental overlap.

Triangulated DNA segments shared by multiple matches indicate inheritance from a common ancestor rather than coincidental overlap.

Once matches are grouped, analytical tools allow you to test inheritance and visualize how DNA segments are shared.

Pro Tip: Focus on triangulated segments — DNA segments shared by multiple people who also match one another. These segments can be attributed to a specific common ancestor rather than chance overlap.

Step 4: Organize Matches by Likely Ancestor (The Leeds Method)



Color-coding DNA matches by likely grandparent line helps distinguish distinct ancestral branches within complex match networks.

Color-coding DNA matches by likely grandparent line helps distinguish distinct ancestral branches within complex match networks.

As your match list grows, organization becomes essential. One of the simplest and most powerful frameworks is the Leeds Method, which assigns colors to DNA matches based on which ancestral line they likely descend from — typically corresponding to the four grandparent branches.

Other systems, such as SMARTTA (Sorting, Mapping, Analyzing, Researching Through Triangulated Analysis), build on this idea by adding additional layers of rigor. SMARTTA is especially valuable in endogamous populations — including Ashkenazi Jewish ancestry — where DNA matches often share multiple ancestral paths.

By emphasizing triangulated DNA segments, contextual analysis, and close integration with documentary research, SMARTTA helps distinguish true shared ancestry from background relatedness, reducing false assumptions in complex genetic networks.

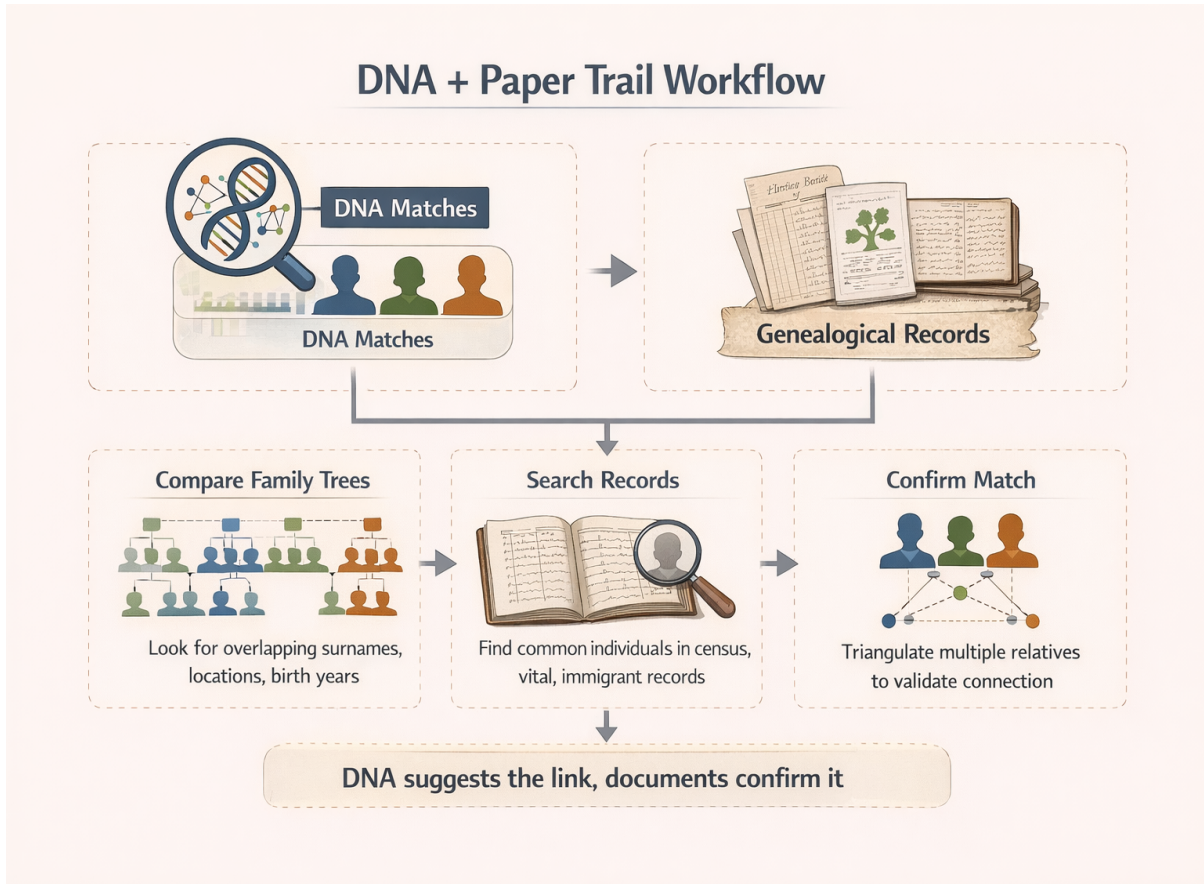
By categorizing and evaluating matches within these frameworks, you can visualize which family branches are well represented — and which remain genetic blind spots.

DNA without organization is data; DNA with structure becomes genealogy.

By organizing matches visually, you can quickly identify which family lines are genetically well represented — and which remain blind spots.

DNA without organization is data; DNA with structure becomes genealogy.

Step 5: Connect DNA to the Paper Trail



DNA points the way — documents confirm the conclusion.

Genetic evidence guides research direction, while documentary records provide confirmation and proof.

DNA can suggest relationships, but documentary evidence provides confirmation.

When a DNA match indicates a possible connection:

- Compare family trees for overlapping names, places, and dates
- Search census, vital, immigration, and other records
- Confirm the relationship through triangulation and multiple matches

DNA gives hints. Records give proof.

Step 6: Go Beyond Autosomal — Y-DNA and mtDNA

Autosomal DNA answers many questions, but Y-DNA and mtDNA allow you to trace direct paternal and maternal lines with greater precision.

These tests are especially valuable for surname studies, deep lineage reconstruction, and distinguishing unrelated families with similar names.

Step 7: Interpret Results in Context

DNA results do not exist in a vacuum. Numbers alone do not tell stories — context gives them meaning.

Interpret genetic evidence through geographic patterns, historical events, migration routes, and cultural naming traditions. Understanding where and how families lived is often as important as the amount of DNA they share.

In populations with significant historical endogamy — including Ashkenazi Jewish ancestry — apparent closeness between DNA matches may reflect multiple shared ancestral paths rather than a single recent relationship. In these cases, interpretation requires particular care.

Prioritize triangulated DNA segments, consistency across multiple matches, and integration with documentary research over raw centimorgan totals or automated relationship estimates. These safeguards help distinguish meaningful shared ancestry from background relatedness.

Step 8: Respect Privacy and Ethical Boundaries

Genetic genealogy involves living people and sensitive information.

- Obtain consent before sharing DNA results
- Avoid publishing identifiable match data without permission
- Handle unexpected discoveries with care and professionalism

The Genome as a Genealogy Journal

Every person carries a genetic journal written across generations.

By reading that journal carefully — and integrating genetic evidence with historical records — we can recover stories once thought lost.

DNA deep dives do not replace traditional genealogy. They refine it.

The deeper you go, the clearer your ancestral picture becomes.

Next in the Genealogy Workflow

Publishing for Posterity — How to Share and Preserve Your Family Research

Publishing for Posterity — How to Share and Preserve Your Family Research for Future Generations

Originally published on January 30, 2026



A family history book open on a desk surrounded by photographs and handwritten documents.

By Gary Katz, Professional Genealogist & Genetic Genealogy Analyst

Over the course of this series, I've outlined how I approach professional genealogy as an evidence-based discipline — not a race to add names, but a process of asking better questions, testing assumptions, and building conclusions that can withstand scrutiny.

Over the course of this series, I've outlined how I approach professional genealogy as an evidence-based discipline — not a race to add names, but a process of asking better questions, testing assumptions, and building conclusions that can withstand scrutiny.

Yet even the most careful research has limited value if it remains scattered, undocumented, or easily lost. If our work is to outlast us — and remain useful to future researchers — it must be organized, contextualized, and deliberately shared.

Publishing Is More Than Sharing

Sharing genealogy often means screenshots, emailed PDFs, or trees copied across platforms. Publishing is different. Publishing is intentional. It assumes an audience beyond the present moment — and it accepts responsibility for accuracy, context, and clarity.



Publishing requires structure, clarity, and intentional authorship.

Publishing Creates Accountability

Once your work leaves your desk, it takes on a life of its own. Others will rely on it. They will quote it, copy it, and build upon it — sometimes long after you're gone.

That reality demands care. Clear sourcing. Explicit distinction between fact, inference, and hypothesis. And transparency about what remains unknown.

Archive Your Work for Long-Term Preservation

Publishing without preservation is fragile. Files disappear. Platforms shut down. Formats change. Responsible genealogy includes redundancy and durability:

- Preserving research notes alongside conclusions
- Maintaining both digital and physical copies where possible
- Using stable formats and clear file naming conventions
- Separating raw evidence from interpretive narrative



Durable preservation requires both physical and digital stewardship.

Publishing Is a Gift to the Future

Most genealogists research backward. Publishing forces us to think forward.

The most meaningful family histories aren't just records of the past — they are bridges to future readers who may not yet know why these stories matter.



Publishing connects past, present, and future readers.

Where This Fits in the Workflow

Publishing isn't the final step because the work is finished. It's the point at which the work becomes shareable, defensible, and durable.

Next in the Workflow

In the next article in this series — Connecting the Dots Through Collaboration — I'll explore how published work invites dialogue, correction, and discovery through others.

Connecting the Dots through Collaboration — How to Partner with Other Genealogists to Accelerate Discovery

Originally published on February 6, 2026



Genealogical discovery rarely happens in isolation — collaboration turns individual research into shared insight.

By Gary Katz, Professional Genealogist & Genetic Genealogy Analyst

Across this guide, we've moved step by step through the Evalu8 genealogy workflow — from building a reliable foundation tree and verifying inherited family stories to identifying living cousins, testing hypotheses, integrating DNA evidence, and publishing durable research.

Each objective strengthens the next.

Now we turn to the objective that transforms solid individual research into something even more powerful: shared discovery.

Connecting the Dots through Collaboration is where carefully built genealogical work begins to compound — expanding through the knowledge, records, and perspectives of others working along the same ancestral paths.

The Myth of the Lone Genealogist

Genealogy often feels solitary — late nights with census records, DNA matches, and digitized parish registers. But no meaningful genealogical breakthrough happens entirely alone.

Behind almost every discovery is another human being: a cousin who shared a photograph, a researcher who indexed a town, or someone who asked the right question at the right time.

Every genealogist knows something you don't. And you know something they don't.



Every breakthrough reflects shared effort — conversations, exchanged records, and insights from others working the same questions.

Clarifying the Collaboration Objective

Before reaching out, be clear about what collaboration can accomplish for your research:

- Verifying a shared ancestor
- Translating foreign-language records
- Understanding historical or community context
- Analyzing DNA segments or clusters
- Extending missing branches of a family

Finding Communities That Match Your Research

- Regional and ethnic genealogical societies
- JewishGen SIGs and KehilaLinks
- DNA and genetic genealogy projects
- Collaborative tree platforms
- Local historical and archival groups

Establishing Credibility and Reciprocity

- Be specific about people, places, and evidence
- Distinguish confirmed facts from hypotheses
- Offer something of value in return
- Assume good faith and shared rigor

Working Within Structured Projects

- FamilyTreeDNA surname or geographic projects
- Collaborative world-tree platforms
- Small research cooperatives
- Academic or archival partnerships

Documenting and Attributing Shared Work

- Credit contributors clearly
- Track sources jointly
- Use shared documents with version control
- Avoid overwriting others' research

Navigating Collaboration Challenges

- Anchor discussion in evidence
- Keep hypotheses labeled
- Allow parallel interpretations when needed

The Collaborative Genealogist's Mindset

Collaboration isn't about losing control. It's about gaining perspective.

When genealogists pool their knowledge, individual trees stop being islands and become networks — connected across time, geography, and shared curiosity.



Collaboration is an ongoing process, revealing new clues long after a question seems settled.

Next in the Workflow

The final article in the series, *Hunting for Random Nuggets*, explores the creative, lateral approaches that can surface unexpected clues when traditional research paths have been exhausted.

Hunting for Random Nuggets — How to Find Unexpected Clues When You Hit a Genealogical Brick Wall

Originally published on February 13, 2026



When the obvious records run dry, a fresh angle often reveals new clues.

By Gary Katz, Professional Genealogist & Genetic Genealogy Researcher

In this article, we turn to one of the most creatively powerful tools in the genealogist's toolkit: Random Nugget Hunting.

This objective comes into play when conventional searches stall — when the obvious records have been checked, the DNA leads feel exhausted, and the trail appears to run cold. Rather than pushing harder in the same direction, Random Nugget Hunting shifts the research lens, opening new pathways through lateral thinking and strategic exploration.

When the Trail Runs Cold

Every genealogist, no matter how experienced, eventually reaches a moment of quiet frustration — that immovable brick wall where no records appear, every lead dries up, and even your best DNA matches seem irrelevant.

It's in these moments that I deliberately shift into what I call Random Nugget Hunting — a creative, freeform approach that breaks routine and opens unexpected doors.

When reason fails, curiosity still works.

Step 1: Shift Your Mindset from Proof to Play

Instead of asking “How can I prove this?” ask: “Where else might this story have left a trace?”

Sometimes the best clue isn’t about your ancestor at all — it’s about the people who lived next to them.

Step 2: Search Surnames in Unusual Combinations

Instead of searching “Isaac Katz, Grodno,” try:

“Katz” + “Oshmiany” + “merchant”

“Kac” + “Suwalki” + “burial”

“Katz” + “synagogue” + “Vilnius”

“Katz” + “ship manifest” + “New York”

Mix surnames with occupations, addresses, or community identifiers — you’ll surface results that structured genealogical searches overlook.

For DNA research, combine surnames from both sides of a match’s tree to see if crossover clusters appear. Shared family names across lines can hint at deep intermarriage or double connections.



Careful review of records often reveals patterns that routine searches overlook.

Step 3: Explore the Collateral Lines

Search siblings, cousins, or in-laws.

Step 4: Use Nontraditional Sources

- City and business directories
- Fraternal organizations
- Newspapers and yearbooks
- Court cases and petitions
- University or synagogue records

Step 5: Go Global with Search — and Multilingual

Use Google Translate to convert search terms into Polish, Russian, Yiddish (Hebrew letters), Lithuanian, or other relevant scripts.

Example searches:

- Кац Гродно метрические книги
- Katze Litwa genealogia

Step 6: Tap into AI and Modern Research Assistants

- Generate alternative search strategies
- Translate difficult documents
- Draft archive inquiry letters
- Brainstorm new record types

Step 7: Look for Serendipity in Neighboring Stories

- FAN club research (Friends, Associates, Neighbors)
- In-law networks
- Geographic clustering



Mapping the FAN network often reveals the hidden path forward.

Step 8: Rest, Reset, and Return

Genealogical breakthroughs rarely happen through brute force.

Recommended Tools for Random Nugget Hunting

General Search:

Google Advanced Search; Google Books; Archive.org

Multilingual Search:

Google Translate + native-language search terms

Creative Assistance:

ChatGPT; Gemini; Bing Copilot

Genealogy Databases:

Ancestry; MyHeritage; FamilySearch; Geneanet

Burial / Records:

FindAGrave; BillionGraves; JewishGen Burial Database

Global Archives:

Polish State Archives (szukajwarchiwach.pl); Yad Vashem; Europeana

Next Steps

You've now seen the full Genealogist's Workflow in action — from building a solid documentary foundation to pursuing creative breakthroughs when the trail runs cold.

The real value of this framework emerges in practice. Return to it when new evidence appears, when DNA raises fresh questions, or when a long-standing mystery finally begins to move.

Because in genealogy, progress rarely comes from doing more searches. It comes from asking better questions.

About the Author

Gary Katz is a professional genealogist and genetic genealogy analyst specializing in Jewish and Eastern European family research, DNA analysis, and lineage reconstruction. He helps clients make sense of their ancestry and document their heritage.

About Genealogy Gary

Genealogy Gary is the professional genealogy and DNA research practice of Gary Katz, specializing in Jewish and Eastern European family research, DNA analysis, and lineage reconstruction.

Website: genealogygary.com

Email: gary@genealogygary.com

Social: [@genealogygary](#)

For research insights and workflow notes, subscribe to [Genealogy Gary's Roots Roundup](#):

Downloaded from genealogygary.com