

**PROFESSIONAL RESEARCH HANDOFF / SAMPLE PROPERTY A**

Illustrative Heirship Diligence Report

A fictional file showing how a potentially omitted family branch can be brought into focus. All people, dates, records, and findings are invented for this example. No searches were conducted and no client information is included.

Read the evidence. See the open questions.

This example follows a possible omitted family branch from the initial question through source references, conflicting information, and follow-up decisions. It supports understanding of the reporting service.

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SCOPE / FINDINGS

1. The assignment and its boundaries

Illustrative sample only - not a completed investigation. This example shows the structure and reasoning of a research handoff. The record descriptions below are invented; they are not links to real evidence. An actual engagement has an agreed scope, fees, expected turnaround, and record-transfer arrangements.

Fictional matter: a title team is reviewing an inherited residential property, identified only as “Sample Property A.” A draft affidavit concerning Martha Ellis lists her son, Daniel Ellis. A family-supplied obituary also refers to a deceased daughter and a granddaughter.

Research question: does the available family information point to a branch missing from the draft, and what evidence or follow-up would help the responsible professionals evaluate that question?

Example scope: compare the reported children, examine the suggested mother-daughter relationships, and reconcile one conflicting death date. This example does not reconstruct every marriage or descendant, search an actual property record, calculate ownership interests, or establish legal heirship.

2. Findings at a glance

- 01 A possible omitted branch deserves review.** The fictional draft affidavit lists Daniel alone [S01]. The illustrative obituary names a deceased daughter, Helen Ellis, and granddaughter, Nina Cole [S02]. Two hypothetical birth records provide additional relationship evidence [S03, S04].
- 02 The example contains a date conflict.** Intake places Helen’s death in 2009; an illustrative death record gives 2010 [S01, S05]. The difference should remain visible until record identity and the underlying information are evaluated.
- 03 The family reconstruction is incomplete.** The example does not establish whether Helen had other children, whether all relevant marriages have been accounted for, or whether additional records change the picture. Nina’s mention is a research lead supported by the example records, not a legal determination.

Review handoff: evaluate the Helen-Nina branch and the supporting materials before relying on the draft’s family account. Counsel and underwriting decide what the evidence means for the matter and what additional requirements apply.

RELATIONSHIPS / SUPPORT

3. Family relationships and their support

The table separates a reported relationship from the evidence that would support it. Every entry is fictional. “Corroborating example” describes the role of an invented record, not verification performed by Heir Apparent.

Illustrative family relationship register

Relationship	Example support	Status and limitation
Robert Ellis / Martha Ellis	Intake identifies them as spouses [S01]; obituary describes Robert as Martha’s predeceased husband [S02].	Reported. No marriage record or complete marital-history research appears in this sample.
Martha / Daniel Ellis	Draft affidavit and obituary identify Daniel as a son [S01, S02].	Reported in two example materials; their underlying informants may overlap.
Martha / Helen Ellis	Obituary names Helen as a daughter [S02]; hypothetical birth record names Martha and Robert as parents [S03].	Corroborating example. Identity matching and record review still matter.
Helen / Nina Cole	Hypothetical birth record names Helen as Nina’s mother [S04]; obituary names Nina as a granddaughter [S02].	Corroborating example. Other children and the full branch remain unresolved.

The relationship is not the conclusion.
The sample records illustrate support for specific family links. They do not establish legal heirship, ownership interests, or completeness of the family reconstruction.

CHRONOLOGY / CONFLICT

4. Chronology: keep disagreement visible

Invented dates for the sample file

Date	Example event	Source and qualification
1967	Helen's birth	S03 supplies the year and reported parents.
1989	Nina's birth	S04 supplies the year and names Helen as mother.
2009 or 2010	Helen's death	S01 reports 2009; S05 gives 2010. Conflict flagged, not silently overwritten.
2013	Robert's death	S01 reports the year; no corresponding death record is included.
2018	Martha's death	S02 and S06 agree on the year in this invented example.
2026	Draft affidavit prepared	S01 is the fictional starting file, not an executed or recorded instrument.

The distinction between an event date and a document's preparation date prevents a later account from appearing contemporaneous. In a real report, relevant record dates, informants, and identity details would be captured where available.

One conflict. Two different assertions.

Helen's death is reported as 2009 in S01 and as 2010 in S05. The report retains both assertions and identifies the question for further review.

SOURCES / TRACEABILITY

5. Source index

All entries below are hypothetical record descriptions. No records were obtained, no databases were searched, and no repository identifiers are asserted. In an actual report, references would identify the specific materials reviewed and their relevant pages or entries, subject to access and handling restrictions.

S01 - Hypothetical intake packet and draft affidavit

Invented 2026 materials supplied by the fictional title team. List Daniel, report Robert's death year, and give Helen's death year as 2009. Starting assertions; not independent corroboration.

S02 - Hypothetical obituary transcription

Invented 2018 text in the sample intake. Names Daniel, Helen, and Nina. Publisher, original notice, and informant are not established; family-supplied text may be incomplete.

S03 - Hypothetical birth-record image: Helen

Invented example of additional documentary support. Names Martha Ellis and Robert Ellis as parents. An actual review would assess identity, provenance, and what the record directly states.

S04 - Hypothetical birth-record image: Nina

Invented example naming Helen Ellis as mother. Does not establish the existence or absence of siblings, later life events, or current whereabouts.

S05 - Hypothetical death-record image: Helen

Invented example giving 2010 as the death year. Creates a conflict with intake rather than an automatic correction.

S06 - Hypothetical death-record image: Martha

Invented example giving 2018 as the death year. Agreement with the obituary does not make every other obituary statement reliable.

S07 - Hypothetical limited-search log

Invented log for one example probate index: "Helen Ellis," "H. Ellis," and years 2009-2011; no matching entry in that index. No actual search occurred.

ANALYSIS / NEXT DECISIONS

6. What the evidence supports - and leaves open

In this scenario, S02 raises the omitted-branch question. S03 and S04 illustrate how separate records could support the two links from Martha to Helen and from Helen to Nina. An obituary's use of "granddaughter" alone would not identify which child connects Nina to Martha.

A real analysis would compare names, dates, locations, and other available identifiers before linking records. It would also assess who supplied each statement: two documents repeating one person's account are not necessarily independent evidence. A vital record's information about an event and its information about family relationships can have different evidentiary strengths.

A negative search is not proof of absence. The fictional S07 result says only that the stated searches returned no match in that example index. It does not prove that no probate file exists, that no estate administration occurred elsewhere, or that Helen had no other children. Record coverage, spelling, indexing, access, and date limits all affect interpretation.

7. Questions for the next research decision

- 01 Validate the starting materials.** Clarify who supplied the family account and whether the draft deliberately excluded any branch. Review original records where available.
- 02 Resolve identity and chronology.** Compare the identifiers behind S03-S06, investigate Helen's conflicting death year, and corroborate Robert's reported death.
- 03 Define the remaining family questions.** Determine what further research is needed into marriages, children, and descendants, including Helen's branch. Record gaps without assuming the family is complete.
- 04 Agree on any expanded assignment.** Separate the initial question from new research. Confirm additional scope, fees, records needed, and expected turnaround before proceeding.

Placing these items beside their supporting sources gives the title team a focused handoff and helps it discuss the next research expense and timing with clearer expectations.

PROFESSIONAL REVIEW / NEXT CONVERSATION

8. How this sample should be used

This fictional illustration demonstrates organization and analysis; it is not a client deliverable, a promised outcome, or evidence that these records are available for another matter. Actual report content depends on the agreed assignment and the evidence accessible within it.

A Heirship Diligence Report supports professional review. It does not determine legal heirs or ownership shares, certify that every heir has been found, supply a title opinion, approve insurability, or replace attorney and underwriting review. No such conclusions are made here.

To discuss a real file, start with a general inquiry. Agree on the research question, scope, fees, expected turnaround, and a suitable channel for documents before sharing confidential matter information. The reporting service can be engaged separately from the technology platform, which is in development.

Start with the research question.

For an initial discussion about genealogy due diligence for a title matter, contact Heir Apparent. Keep your first inquiry general; arrange a suitable document-sharing channel before sending confidential information.

Discuss the reporting service
sales@heirapparentapp.com
heirapparentapp.com/due-diligence

Available service. Developing technology.

The reporting service can be engaged separately. Heir Apparent's technology platform is in development, with design partners helping shape the tools.

No actual investigation was performed for this sample. Every person, record, date, and finding in the example is fictional.