



BUILD YOUR SKILLS ↔ **GROW YOUR BUSINESS**

PMC 2025

VIRTUAL PROFESSIONAL MANAGEMENT CONFERENCE

PROGRAM

18-20 SEPTEMBER 2025



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BOARD FOR CERTIFICATION OF GENEALOGISTS



ICAPGen
The International Commission for the Accreditation of Professional Genealogists




SCHEDULE

Thursday, September 18, 2025

All times are Eastern Daylight Time (EDT)

Thursday and Friday course recordings will be available through January, 2026.



10-10:45 a.m. EDT	Keynote Address	
10:45-11 a.m. EDT	Break	
11 a.m.- 12 p.m. EDT	Elevating Evidence: Simple Design Strategies for More Polished Work	Kelley Conner Lear, CG®
12-1 p.m. EDT	Break for Lunch / Speed Networking — Sponsored by Storied	
1-2 p.m. EDT	Setting Pricing: Let's Talk Money	Rhonda Lauritzen, MBA
2-2:15 p.m. EDT	Break	
2:15-3:15 p.m. EDT	Bringing the Past to Life: Storytelling Skills for Genealogy and History	J. Mark Lowe, FUGA
3:15-3:30 p.m. EDT	Break	

SCHEDULE

Thursday, September 18, 2025

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3:30-4:30 p.m. EDT	Panel Discussion: Professional Genealogy Credentials	Angela Packer McGhie, CG [®] ; Shannon Green, CG [®] , CGG SM , CGL SM ; Jenny Hansen, AG [®] , AGL SM ; and Francine Crowley Griffis, CG [®] , AG [®] , QG
	Tip Talks	
4:30-4:50 p.m. EDT	Translation? Avoid These 5 Common Mistakes	Bryna O'Sullivan
4:50-5:15 p.m. EDT	3 Best Pieces of Advice for New Presenters	Allyson Maugham, AG [®]
5:15-5:30 p.m. EDT	Break	
5:30-6:30 p.m. EDT	Bingo — Sponsored by Goldie May	
6:30-7:30 p.m. EDT	Vivid-Pix — Gold Sponsor Session	

SCHEDULE

Friday, September 19, 2025

All times are Eastern Daylight Time (EDT)

Thursday and Friday course recordings will be available through January, 2026.


9-10 a.m. EDT	Borrowed Brilliance: Adapting Smart Practices from Beyond Genealogy	Cathie Sherwood, M.Ed.
10-11 a.m. EDT	Behind the Scenes: Mitotree & Mito Discover AMA with the Experts - FTDNA Gold Sponsor Session	 FamilyTreeDNA
11-11:15 p.m. EDT	Break	
11:15-12:15 p.m. EDT	Panel Discussion: Professional Genealogy in the Age of AI — Guidelines and Challenges	Lynn Broderick, Steve Little, and Angela Packer McGhie, CG®
12:15-1:15 p.m. EDT	Lunch / APG Community Breakout Sessions	 Association of Professional GENEALOGISTS
	Tip Talks	
1:15-1:35 p.m. EDT	HoneyBook for Genealogists	Laura Cubbage Draper, CG®
1:35-1:55 p.m. EDT	3 Trello Boards that Keep My Business on Track	Carol Genung
1:55-2:15 p.m. EDT	17hats — How Many Business Hats Do You Wear?	Catherine B.W. Desmarais, CG®
	OR	
1:15-2:15 p.m. EDT	Panel Discussion: Getting Started in Podcasting	Drew Smith, MS, MLIS, and George G. Morgan

SCHEDULE

Friday, September 19, 2025

All times are Eastern Daylight Time (EDT)

Thursday and Friday course recordings will be available through January, 2026.

2:15-2:30 p.m. EDT	Break	
2:30-3:30 p.m. EDT	Growing your Online Reach: AI Writing Tools for Busy Genealogists	Nicole Dyer
3:30-3:45 p.m. EDT	Break	
3:45-4:45 p.m. EDT	Expanding Your Genealogy Business with Artificial Intelligence: Smarter Workflows and Custom Tools	Andrew Redfern
	OR	
3:45-4:45 p.m. EDT	Recordkeeping for Genealogists: Getting Started and Introduction to Financial Statements	Douglas Klein, CPA
4:45-5 p.m. EDT	Break	
5-6 p.m. EDT	'Ask Geni': Using AI Tools to Expand your Genealogy Practice	Lori Samuelson
	OR	
5-6 p.m. EDT	Beyond the Basics: Advanced PowerPoint Techniques for Professional Genealogists	Andrew Redfern
6-7 p.m. EDT	Scavenger Hunt - Sponsored by NGS	 NATIONAL GENEALOGICAL SOCIETY

SCHEDULE

Optional Workshops – Saturday, September 20, 2025

Morning Session

All times are Eastern Daylight Time (EDT)

Workshops are not recorded, and each workshop is limited to 30 people.

There is an additional cost for workshops. You may choose to attend one workshop in the morning and/or one in the afternoon.



Michael Ramage, JD, CG®



Catherine Desmarais,
CG®

Saturday, September 20, 2025 10:30 a.m.–1 p.m. EDT

Practical Tools for Your Forensic Genealogy Practice - Part 1

This hands-on workshop is designed for genealogists who conduct research for attorneys, particularly in probate, real estate, and other legal matters. Whether you're launching or refining your forensic genealogy business, this session will provide practical tools to support your work in legal contexts. In the morning, instructors will walk participants through setting up efficient workflows, developing clear client contracts, improving communication practices, and minimizing liability. Sample documents will be provided, and attendees will have time to collaborate in small groups to begin customizing them for their own practices.

Participants may register for morning and afternoon sessions separately, or for the full-day workshop.

Bios

Michael Ramage is co-author of *Forensic Genealogy: Theory and Practice*, as well as a full-time, board-certified genealogist with more than 20 years' experience. His legal background includes family, adoption, business, real estate and estate law. He specializes in missing and unknown heirs in trusts and estates, and real estate in the mid-Atlantic region.

Catherine Desmarais is co-author of *Forensic Genealogy: Theory and Practice*, former APG vice president, and she specializes in forensic genealogy to resolve military repatriation, estate, and realty cases. As a US Department of Defense qualified genealogist, she and her research team have located families for more than twelve hundred World War II and Korean War soldiers.

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Optional Workshops – Saturday, September 20, 2025

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Rhonda Lauritzen, MBA

Saturday, September 20, 2025 10:30 a.m.–1 p.m. EDT

Organizing Big Projects

Being well-organized around big projects is essential for success as your business expands.

In this workshop, I will share my actual templates and will give students time to do exercises to assess their processes, brainstorm areas for improvement, and benchmark best practices with other attendees. These templates are used to manage my business today and have a proven track record, including adoption by other historic preservation professionals who have collaborated with me on multiple projects.

In the workshop, we will cover landing the client (the proposal, the "not to exceed" estimate, the calendar to completion, the signed agreement); onboarding the client (onboarding checklist, timekeeping log, and digital folder structure for tracking individual pieces of the project); and the research and writing phase (templates, use of AI and specific programs to manage the process and improve productivity).

Bio

Rhonda Lauritzen is the founder of Evalogue Life and a professional biographer with multiple published books. She has an MBA from the University of Utah. Her two most recent books were traditionally published in late 2024: *A Child in Berlin* by Post Hill Press and *Creative Insecurity: Lean Into the Unknown and Unleash Your Inner Misfit* by Simon & Schuster. She believes that when you tell your story, it changes the ending.

SCHEDULE

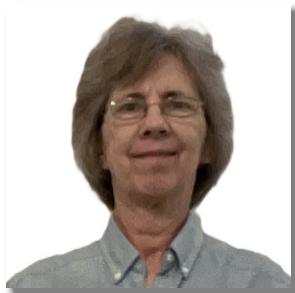
Optional Workshops – Saturday, September 20, 2025

Afternoon Session

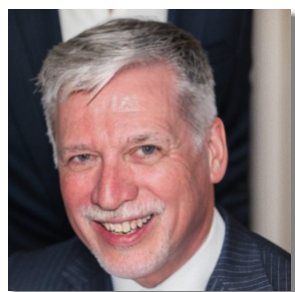
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Linda M. Hunter, M.S.,
PLCGS



Kelvin Meyers, FTxSGS

Saturday, September 20, 2025 2–4:30 p.m. EDT

Practical Tools for Your Forensic Genealogy Practice — Part 2

In the afternoon, the focus shifts to affidavit writing. Using provided case examples, participants will draft partial affidavits with guidance from instructors. The session includes examples of challenging scenarios and small group exercises to practice real-world problem-solving in forensic genealogy.

Participants may register for morning and afternoon sessions separately, or for the full-day workshop.

Bios

Linda M. Hunter, MS, PLCGS, has been researching for over twenty-five years, primarily in the Mid-Atlantic Region. Growing up in northwest Pennsylvania, she served as a Naval Officer for 28 years, living in and deploying to six different countries and five US states. Upon her retirement from the U.S. Navy in 2015, Linda turned her passions for family history and tackling tough analytic problems into a genealogical career. She focuses on forensic genealogical endeavors, primarily locating missing and unknown heirs for attorneys. She holds a Bachelor's Degree in History from the University of Maryland, Baltimore County, and Master's degrees in Applied Mathematics and Systems Technology (Space Operations) from the Naval Postgraduate School.

A fifth generation Texan and professional forensic genealogist since 1996, Kelvin Meyers is a well-known speaker and author. Kelvin specializes in heir location and mineral rights cases. He is the author of the mineral rights chapter of *Forensic Genealogy Theory and Practice*, and a fellow of the Texas State Genealogical Society.

SCHEDULE

Optional Workshops – Saturday, September 20, 2025

Afternoon Session

All times are Eastern Daylight Time (EDT)

Workshops are not recorded, and each workshop is limited to 30 people.

There is an additional cost for workshops. You may choose to attend one workshop in the morning and/or one in the afternoon.



Cathie Sherwood, M.Ed.

Saturday, September 20, 2025 3–5:30 p.m. EDT

Design Smarter: Reimagining Reports, Courses and Presentations

This practical, hands-on workshop helps genealogists transform reports, course materials, and presentations from functional to fantastic. No graphic design skills or expensive software required.

Bio

Cathie Sherwood is the founder of Family History Academy, providing online courses and resources to support family historians at all levels. She is a highly regarded family historian, educator, and international speaker with over four decades of expertise in tracing Irish, English, and Scottish ancestry. She holds a Master's Degree in Education and a Diploma in Family Historical Studies.

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)

Thursday, September 18, 2025 10–10:45 a.m. EDT [Keynote](#)

Thursday, September 18, 2025 10:45–11 a.m. EDT [Break](#)



Kelley Connor Lear,
CG®

Thursday, September 18, 2025 11 a.m.–12 p.m. EDT

[Elevating Evidence: Simple Design Strategies for More Polished Work](#)

Thoughtful genealogical research deserves thoughtful presentation. This session will demonstrate how simple design choices and principles can help organize complex information, highlight reasoning, and create hierarchy leading to more polished reports, websites, and presentations. We'll discuss font legibility and selection, basic layout principles, color schemes, and tools that help show off your reasonably exhaustive research. Whether you're preparing a client report or sharing research with colleagues, simple, thoughtful design choices can help your work shine.

Bio

Kelley Conner Lear is a Certified Genealogist® specializing in research in her home state of West Virginia, as well as Virginia, Central Appalachia, and the Allegheny Highlands. Kelley currently serves on the Board of the Virginia Genealogical Society. She also chairs the APG Professional Development Committee and sits on the Board of the Association of Professional Genealogists (APG). An alumna of ProGen 52 and ProGen Practicum 2, she now mentors ProGen 69.

Thursday, September 18, 2025 12–1 p.m. EDT [Lunch Break](#)

[Speed Networking - Sponsored by Storied](#)



COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)



Rhonda Lauritzen, MBA

Thursday, September 18, 2025 1–2 p.m. EDT

Setting Pricing: Let's Talk Money

Achieve viability and freedom by optimizing your pricing strategy. This workshop is one part tough love, one part strategic pep talk, and one part practical data. I have been collecting data for years from official and unofficial sources on what people are charging. We will explore genealogy services and related industries such as those for writers, editors, and historic preservation professionals. We will walk through rates for various levels of experience, and how much you need to add for overhead. In addition, we will address the practical question of how many hours per day, week, month, and year you can realistically bill.

Bio

Rhonda Lauritzen is the founder of Evalogue Life and a professional biographer with multiple published books. She has an MBA from the University of Utah. Her two most recent books were traditionally published in late 2024: *A Child in Berlin* by Post Hill Press and *Creative Insecurity: Lean Into the Unknown and Unleash Your Inner Misfit* by Simon & Schuster. She believes that when you tell your story, it changes the ending.

Thursday, September 18, 2025 2–2:15 p.m. EDT **Break**

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)



J. Mark Lowe, FUGA

Thursday, September 18, 2025 2:15–3:15 p.m. EDT

Bringing the Past to Life: Storytelling Skills for Genealogy and History

Genealogy is more than a collection of names, dates, and documents; it's the story of lives once lived. Yet too often, the richness of those lives is lost in dry lists and technical reports. This session is designed to help genealogists and history enthusiasts alike transform their research into compelling, emotionally resonant stories that connect with readers and listeners on a human level.

Whether you're writing a family history, preparing a presentation, or simply sharing discoveries with relatives, storytelling is the key to making your work meaningful and memorable. This session will introduce both the art and craft of storytelling, tailored specifically for those working with genealogical and historical material.

Bio

J. Mark Lowe, FUGA, is a semi-retired professional genealogist, author, and teacher who researches primarily in original records and manuscripts throughout the South. He serves as the Course Coordinator for "Research in the South" at IGHR (Georgia), SLIG (Utah), and TIGR (Texas); he is a former president of APG, a Fellow of the Utah Genealogical Association, and was awarded the APG Grahame T. Smallwood Jr. Award, as well as an APG Lifetime Membership.

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)

Thursday, September 18, 2025 3:15–3:30 p.m. EDT **Break**

Thursday, September 18, 2025 3:30–4:30 p.m. EDT

Professional Genealogy Credentials: A Panel Discussion

Earning a genealogical credential is a goal of many professional genealogists. Those investigating which credential to pursue often have questions and benefit from talking to those who are credentialed. The four panelists together hold six different types of credentials. They will each share their educational preparation, reason for seeking a credential (or several), their personal journey, and tips for others working to earn credentials.

Topics covered:

- The benefits of being credentialed
- The application process for each credentialing body
- The skills tested, such as research, analysis, reporting, and writing
- Educational preparation
- Addressing questions from the audience

This session will detail the two main credentialing boards, the International Commission for the Accreditation of Professional Genealogists (ICAPGen) and the Board for Certification of Genealogists (BCG), and also cover credentials outside the United States and the new Investigative Genetic Genealogy Accreditation Board (IGGAB).

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)

Thursday, September 18, 2025 3:30–4:30 p.m. EDT

Professional Genealogy Credentials: A Panel Discussion, *continued*

Many genealogy credentials will be discussed, including:

- Certified Genealogist (CG)
- Certified Genealogical Lecturer (CGL)
- Certified Genetic Genealogist (CGG)
- Accredited Genealogist (AG)
- Accredited Genealogical Lecturer (AGL)
- Qualified Genealogist (QG)
- Accredited Investigative Genetic Genealogist (AIGG)
- Professional Learning Certificate in Genealogical Studies (PLCGS)
- Accredited Genealogist Ireland (AGI)

Credentials

- Angela Packer McGhie, CG[®], is passionate about genealogy education and serves as the vice president of the Board for Certification of Genealogists.
- Shannon Green, CG[®], CGGSM, CGLSM, is a board-certified genealogist, researcher, and writer. Shannon serves as a trustee for the Board for Certification of Genealogists.
- Jenny Hansen, AG[®], AGLSM, holds a bachelor's degree in Family History and Genealogy. Jenny currently serves as a commissioner for ICAPGen and is the director of SLIG.
- Francine Crowley Griffis, CG[®], AG[®], QG, is a pending Master's graduate and provisional Doctoral Candidate at the University of Strathclyde, Glasgow.



Angela Packer McGhie,
CG[®]



Shannon Green, CG[®],
CGGSM, CGLSM



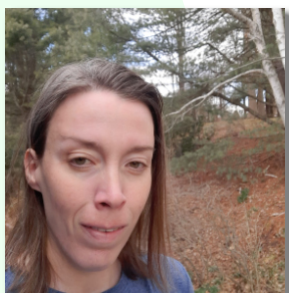
Jenny Hansen, AG[®],
AGLSM



Francine Crowley Griffis,
CG[®], AG[®], QG

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)



Bryna O'Sullivan

Thursday, September 18, 2025 4:30–4:50 p.m. EDT

TIP TALK: Translation? Avoid these 5 Common Mistakes

When genealogists encounter records in another language, they face a challenge: do I try to translate on my own, or do I need a specialist in the language?

This short tip talk will cover five common translation challenges to help make that decision.

Bio

Bryna O'Sullivan is a Middletown, Connecticut-based professional genealogist and French-to-English genealogical translator. As proprietor of Charter Oak Genealogy, she specializes in lineage society applications.



Allyson Maughan, AG®

Thursday, September 18, 2025 4:50–5:15 p.m. EDT

TIP TALK: 3 Best Pieces of Advice for New Presenters

Learn about the importance of getting your presentations ready, putting your name out there, updating your website, and more.

Bio

Allyson Maughan is a genealogy speaker, writer, and consultant based in Salt Lake City. She holds an Accredited Genealogist® credential in the Southwest Region from ICAPGen and a BS from Idaho State. She is a UGA board member and a member of the Association of Professional Genealogists. She enjoys pictures and writing, which she shares on rememberingrelatives.weebly.com/.

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)

Thursday, September 18, 2025 5:15–5:30 p.m. EDT **Break**

Thursday, September 18, 2025 5:30–6:30 p.m. EDT

Bingo! Sponsored by Goldie May

goldiemay

Thursday, September 18, 2025 6:30–7:30 p.m. EDT

VIVID-PIX Gold Sponsor Session

VIVID-PIX®

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)



Cathie Sherwood, M.Ed.

Friday, September 19, 2025 9–10 a.m. EDT

Borrowed Brilliance: Adapting Smart Practices from Beyond Genealogy

What do coaching, financial services, journalism, and digital design have in common with professional genealogy? More than you might think. In this forward-thinking session, we'll explore the smart, proven business models and client-experience strategies; the brilliance developed in other professions; and how they can be adapted to strengthen your genealogy practice and reimagine how you work.

You'll discover how coaching frameworks like VIP Days can be reimaged to offer high-value, immersive genealogy services; how client relationship strategies from financial planning can help build loyalty and repeat business; and how design principles from UX/UI can make your reports and presentations more engaging and easier to navigate.

Rather than reinventing the wheel, professional genealogists can borrow what works and then tailor it to the unique demands of our field. This session offers a practical roadmap filled with real-world examples, tools, and ideas to help you work more efficiently, serve clients more thoughtfully, and build a resilient, future-ready practice.

Bio

Cathie is the founder of Family History Academy, providing online courses and resources to support family historians at all levels. She is a highly regarded family historian, educator, and international speaker with over four decades of expertise in tracing Irish, English, and Scottish ancestry. She holds a Master's degree in education, and a Diploma in Family Historical Studies.

COURSE DETAILS AND INSTRUCTOR BIOS (in order of presenters)

Friday, September 19, 2025 10–11 a.m. EDT

Behind the Scenes: Mitotree & Mito Discover AMA with the Experts

Join members of the development team for an "Ask Me Anything" session on the recently enhanced Mitotree and the all-new Mito Discover tool. This interactive Q&A will delve into the nuances of these powerful updates, providing professional genealogists direct insights into maximizing mitochondrial DNA for their research. Bring your toughest questions!



Friday, September 19, 2025 11–11:15 p.m. EDT **Break**

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)

Friday, September 19, 2025 11:15–12:15 a.m. EDT

Panel Discussion: Professional Genealogy in the Age of AI— Guidelines and Challenges

This panel will examine how AI impacts professional genealogy with a focus on accuracy, disclosure, privacy, education, and compliance to ensure ethical and effective research practices.

From machine learning tools that analyze historical records to AI-powered platforms that suggest familial connections, the opportunities for enhanced efficiency and discovery are expanding. However, with these advancements come ethical responsibilities and challenges. How do professionals ensure the accuracy of AI-generated data? When and how should they disclose the role of AI in their work? What are the implications for privacy, especially when dealing with sensitive family histories or genetic information?

This discussion will focus on the five core principles that must guide professional genealogists as they engage with AI technologies. Attendees will gain a deeper understanding of how AI is reshaping the professional genealogy landscape, what risks and rewards it presents, and how to navigate these changes with integrity and competence.

Bios

Lynn Broderick, also known as the Single Leaf, is a writer by birth, a teacher by profession, and a researcher by passion. She continues to host the first-ever NGSQ/Record Study Group. She enjoys researching individuals of the past in the context of family, community, and social history. She champions genealogy ethics and standards in the community.

Steve Little, AI Program Director for the National Genealogical Society, founder of AI Genealogy Insights, and cohost of The Family History AI Show, is a leader in integrating AI and genealogy. With graduate training in computational linguistics and natural language processing and a previous career building information systems for libraries and archives, his work now focuses on endogamy, pedigree collapse, and AI's applications and limits in genealogy.

Angela Packer McGhie, CG®, is a professional researcher, lecturer, and instructor. She is the Vice President of the Board for Certification of Genealogists. She enjoys coordinating and teaching courses at the Institute of Genealogy and Historical Research, the Salt Lake Institute of Genealogy, and the Genealogical Institute on Federal Records.



Lynn Broderick



Steve Little



Angela Packer McGhie,
CG®

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)

Friday, September 19, 2025 12:15–1:15 p.m. EDT

Lunch / APG Community Breakout Sessions



Association of Professional
GENEALOGISTS



Laura Cubbage-Draper,
CG®

Friday, September 19, 2025 1:15–1:35 p.m. EDT

TIP TALK: HoneyBook for Genealogists

Looking for a better way to manage contracts, invoices and projects? Learn how HoneyBook, a client relationship platform, can organize your business in one place.

Bio

A New Jersey native with deep Pennsylvania roots, Laura Cubbage-Draper, CG®, is a genealogical researcher, lecturer, and the owner of LCD Genealogy Services.

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)



Carol Genung

Friday, September 19, 2025 1:35–1:55 p.m. EDT

TIP TALK: 3 Trello Boards That Keep My Business on Track

Discover three Trello boards that professional genealogists can use to organize client research, track admin tasks, and streamline business operations efficiently.

Bio

As a professional genealogist, Carol Genung has researched, written, and lectured on a variety of genealogy topics. She holds a Certificate in Genealogical Research from Boston University and is a graduate of ProGen. Carol currently works as a Project Manager with Legacy Tree Genealogists.



Catherine B.W. Desmarais,
CG®

Friday, September 19, 2025 1:55–2:15 p.m. EDT

TIP TALK: 17hats — How Many Business Hats Do You Wear?

17hats organizes your workflow and client relationship management. Learn top tips from a ten-year user!

Bio

Catherine Desmarais is co-author of *Forensic Genealogy: Theory and Practice*, former APG vice president, and specializes in forensic genealogy to resolve military repatriation, estate, and realty cases. As a US Department of Defense qualified genealogist, she and her research team have located families for more than twelve hundred World War II and Korean War soldiers.

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)

OR (two presentations in this time slot)

Friday, September 19, 2025 1:15–2:15 p.m. EDT

TIP TALK PANEL: Getting Started in Podcasting

Ever thought about starting a podcast? How does it work? What kind of preparation is required? Learn the ropes from The Genealogy Guys — George G. Morgan and Drew Smith! They'll share some lessons learned and some success stories, gleaned from 20 years of running their popular and successful podcast.

Bios

George G. Morgan is president of Aha! Seminars, Inc.® Co-host of *The Genealogy Guys Podcast*, he is an internationally recognized genealogy speaker and columnist. George's books include *How to Do Everything: Genealogy* (4th ed.) and *Advanced Genealogy Research Techniques*. He authored a chapter in *Professional Genealogy: Preparation, Practice and Standards*.

Drew Smith, MS, MLIS, is an associate librarian emeritus at the USF Libraries in Tampa. Co-host of *The Genealogy Guys Podcast* and host of the *Genealogy Connection* podcast, he writes a regular productivity column for APGQ. Drew's books include *Advanced Genealogy Research Techniques*, *Organize Your Genealogy*, and *Generation by Generation*.



Drew Smith, MS, MLIS, and George G. Morgan

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)

Friday, September 19, 2025 2:15–2:30 p.m. EDT **Break**



Nicole Dyer

Friday, September 19, 2025 2:30–3:30 p.m. EDT

Growing Your Online Reach: AI Writing Tools for Busy Genealogists

Learn to leverage AI tools to efficiently create content including blog posts, marketing copy, and social media posts, while preserving your unique professional voice.

Bio

Nicole Dyer is a professional genealogist specializing in Southern United States research and genetic genealogy. She is the creator of FamilyLocket.com and the *Research Like a Pro Genealogy Podcast*. She co-authored *Research Like a Pro: A Genealogist's Guide* and *Research Like a Pro with DNA* and is an instructor for their study groups. Nicole holds a bachelor's degree from BYU.

Friday, September 19, 2025 3:30–3:45 p.m. EDT **Break**



Andrew Redfern

Friday, September 19, 2025 3:45–4:45 p.m. EDT

Expanding Your Genealogy Business with Artificial Intelligence: Smarter Workflows and Custom Tools

This session explores practical ways genealogists can integrate AI to streamline workflows, create custom tools, and stay current with evolving technology while maintaining ethical standards.

Bio

Andrew Redfern, based in Sydney, Australia, is a current Director of the Society of Australian Genealogists, contributing significantly to its education and IT programmes, and was a driving force behind the Ironclad Sisterhood project. He is recognised internationally as a leading voice on the application of Artificial Intelligence in genealogy.

OR (two presentations in this time slot)

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)



Doug Klein, CPA

Friday, September 19, 2025 3:45–4:45 p.m. EDT

Recordkeeping for Genealogists: Getting Started and Introduction to Financial Statements

What are they?

- Paper, Spreadsheets, or Software
- Mandatory and Optional Records
- Banking and Taxes
- How Long to Keep Records

Bio

Doug Klein is a Certified Public Accountant (CPA), a professional genealogist, and the owner of PK-Genealogy, LLC. He is the current Treasurer, Finance Chair and a board member of the National Genealogical Society. While primarily a tax expert, Doug also provides advice on best practices for small business owners to comply with recordkeeping and tax regulations.

Friday, September 19, 2025 Break 4:45–5 p.m. EDT



Lori Samuelson

Friday, September 19, 2025 5–6 p.m. EDT

'Ask Geni': Using AI Tools to Expand Your Genealogy Practice

Learn how AI tools can streamline genealogy research, writing, and client work, saving time, reducing burnout, and enhancing productivity for professional genealogists.

Bio

Lori Samuelson is an author, educator, researcher, and lecturer. She blogs weekly at GenealogyAtHeart.com, where she shares heartwarming discoveries and explores sensitive genealogical topics. Lori's work has appeared in numerous genealogy publications and journals. She is currently writing her sixth book, *Echoes of Britannia: A British Legacy in a New Land*.

OR (two presentations in this time slot)

COURSE DETAILS AND INSTRUCTOR BIOS

(in order of presenters)



Andrew Redfern

Friday, September 19, 2025 5–6 p.m. EDT

Beyond the Basics: Advanced PowerPoint Techniques for Professional Genealogists

Master advanced PowerPoint skills to create seamless, engaging, and professional presentations tailored to the unique needs of genealogical research and storytelling.

Bio

Andrew Redfern, based in Sydney, Australia, is a current Director of the Society of Australian Genealogists, contributing significantly to its education and IT programmes, and was a driving force behind the Ironclad Sisterhood project. He is recognised internationally as a leading voice on the application of Artificial Intelligence in genealogy.

Friday, September 19, 2025 6–7 p.m. EDT

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