

apg[®]

Association of Professional
GENEALOGISTS



PMC 2026

VIRTUAL PROFESSIONAL MANAGEMENT CONFERENCE

RESEARCH TO REVENUE: RAISING THE BAR

14-17 OCTOBER 2026

PROGRAM



© 2026 Association of Professional Genealogists
P.O. Box 2369, Poulsbo, Washington 98370

Copyright applies to the compiled material herein known as the APG Professional Management Conference Program. Any copying, electronic manipulation, or other use of this matter, beyond the limitation of “fair use” is expressly prohibited without the written permission of the Association of Professional Genealogists. Each lecturer retains the specific, individual copyright for his, her, or their submitted material.

APG is a registered trademark of the Association of Professional Genealogists.

SPONSORS

Thank you to our 2026 APG Professional Management Conference sponsors

Gold


 The logo for VIVID-PIX features the word "VIVID" in large, bold, multi-colored letters (red, green, orange, purple) followed by "PIX" in dark grey. A registered trademark symbol (®) is located at the top right of the "X".

Silver



NATIONAL
GENEALOGICAL
SOCIETY

Workshop


 The logo for goldiemay features the word "goldie" in a bold, lowercase, sans-serif font, followed by "may" in a lowercase, cursive script font.

Bronze



Supporter


 The logo for MyHeritage features a stylized orange circular icon with a white shape inside, followed by the word "MyHeritage" in a bold, orange, sans-serif font.

SCHEDULE

WEDNESDAY, 14 OCTOBER 2026

WEDNESDAY Time (EDT)	Networking and Games
2:30-2:45 p.m.	Icebreaker Game
2:45-3:15 p.m.	Networking
3:15-3:45 p.m.	Topic Breakout Rooms
3:45-4 p.m.	Break
4-5 p.m.	Games
<p>If you are not able to make the networking/game time above, we will repeat the same schedule at 10:30 p.m. Eastern.</p>	
10:30-10:45 p.m.	Icebreaker Game
10:45-11:15 p.m.	Networking
11:15-11:45 p.m.	Topic Breakout Rooms
11:45 p.m. -12 a.m.	Break
12-1 a.m.	Games

SCHEDULE

THURSDAY, 15 OCTOBER 2026

All times are Eastern Daylight Time (EDT)

Thursday and Friday course recordings
will be available through 31 January 2027.

THURSDAY Time (EDT)	Track One Growing and Managing Your Business	Track Two New Professionals: Starting Strong
9-10 a.m.	KEYNOTE PANEL: "Research to Revenue: Changes Reshaping Genealogy in AI, DNA, and Archives" Panelists: Mark Thompson; Blaine Bettinger, PhD, JD; and Joy Banks, MSLS	
10-10:15 a.m.	Break	Break
10:15-11:15 a.m.	"Practical Approaches to Building a Multi-faceted Genealogy Business," Dr. Penny Walters	"From First Client to Lifelong Client: Building a Genealogy Workflow That Encourages Repeat Business," Melissa Harrison
11:15-11:30 a.m.	Break	Break
11:30 a.m. -12:30 p.m.	"Smarter Not Harder: Creating Systems for Your Genealogy Business," Laura Cubbage-Draper, AG®	"Easy CRM Tools: Managing Client Projects and Contractors With Google Sheets and Airtable," Diana Elder, AG®, AGL
12:30-1:15 p.m.	Lunch with Genealogy Credentials panelists (see program)	

SCHEDULE

THURSDAY, 15 OCTOBER 2026

All times are Eastern Daylight Time (EDT)

Thursday and Friday course recordings
will be available through 31 January 2027.


THURSDAY Time (EDT)	Track One Growing and Managing Your Business	Track Two New Professionals: Starting Strong
1:20-2:25 p.m.	Tip Talk: "Lineage Society Standards for Professionals," Bryna O'Sullivan Tip Talk: "Beyond Research: Building a Filing System that Works," Fiona Brooker	
2:25-2:45 p.m.	Break	Break
2:45-3:45 p.m.	"From Invisible to In-Demand: SEO strategies for genealogists," Maggie Gaffney	"Client Communication: Writing Reports That Educate and Satisfy," Jill Nock, AG®
3:45-4 p.m.	Break	Break
4-5 p.m.	PANEL: "From Concept to Classroom: Genealogists Share How They Built Courses That Teach and Inspire," Panelists: Diana Elder, AG, AGL; Sue McNelly, AG®, Angela Packer McGhie, CG®, FUGA, and Jan Joyce, CG®, CGL SM , AG®	"From Stage Fright to Spotlight: Become a Genealogical Speaker," Dr. Kate Penney Howard
5-6 p.m.	GAME	

SCHEDULE

FRIDAY, 16 OCTOBER 2026

All times are Eastern Daylight Time (EDT)

Thursday and Friday course recordings
will be available through 31 January 2027.

FRIDAY Time (EDT)	Track One Technology	Track Two Niches
9-9:30 a.m.	Gold Sponsor Session with Vivid-Pix 	
9:30 a.m.	TBA	
10-10:15 a.m.	Break	Break
10:15-11:15 a.m.	“Using NotebookLM as a Research Assistant,” Kaitlyn Pauley	PANEL: “Find Your Voice: Podcasting as a Path to Community, Clients, and Credibility,” Drew Smith, Nicole Dyer, Mark Thompson, and Andrew Koch
11:15-11:30 a.m.	Break	Break
11:30 a.m. -12:30 p.m.	“Protecting Client Information in the Age of AI,” Mark Thompson	“Stop Chasing Every Client: How Specialization Strengthens Your Genealogy Business,” Jennifer Dunn
12:30-1:15 p.m.	Lunch	

SCHEDULE

FRIDAY, 16 OCTOBER 2026

All times are Eastern Daylight Time (EDT)

Thursday and Friday course recordings
will be available through 31 January 2027.

FRIDAY Time (EDT)	Track One Technology	Track Two Niches
1:20-2:25 p.m.	TipTalk: "From Records to Restoration," Tamiquia Simon TipTalk: "Have Tree, Will Travel!" Lisa Vogele	
2:25-2:45 p.m.	Break	Break
2:45-3:45 p.m.	"AI Guardrails for Genealogy Research: What Every Professional Genealogist Needs to Know Before Using AI," Kelly Bennett	"Printing and Publishing Paths," Rhonda Lauritzen
3:45-4 p.m.	Break	Break
4-5 p.m.	"Accessibility for Client Reports," Carla Cegielski	"Speaking as a Business: Managing, Pricing, and Growing Your Lecturing Income Stream," Shannon Combs-Bennett, PhD, QG, FSAScot.
5-6 p.m.	CLOSING REMARKS	

SCHEDULE

SATURDAY, 17 OCTOBER 2026

All times are Eastern Daylight Time (EDT)

SATURDAY Time (EDT)	MORNING	AFTERNOON
10 a.m. -12:30 p.m.	“When Family History Hurts: Trauma-Informed Genealogy and the Unreasonably Exhausted Researcher,” Kate Penney Howard	
10 a.m. -12:30 p.m.	“Developing Business Workflows,” Katherine O'Connell	
Lunch		
2-4:30 p.m.	“Airtable Meets AI: Smarter Transcription & Research Logging,” Nicole Dyer Sponsored by Goldie May 	
2-4:30 p.m.	“Advanced PowerPoint Skills for Professional Genealogists,” Andrew Redfern	

COURSE DETAILS

THURSDAY, 15 OCTOBER 2026

Thursday, 15 October 2026 9–10 a.m. EDT

Keynote Panel — Research to Revenue: Changes Reshaping Genealogy in AI, DNA, and Archives

Panelists: Mark Thompson; Blaine Bettinger, PhD, JD; and Joy Banks, MSLS

Thursday, 15 October 2026 10–10:15 a.m. EDT **Break**

COURSE DETAILS

THURSDAY, 15 OCTOBER 2026

DAY ONE — CHOOSE A TRACK (or mix and match)

TRACK ONE: Growing and Managing Your Business

TRACK TWO: New Professionals—Starting Strong

Thursday, 15 October 2026 10:15–11:15 a.m. EDT

TRACK ONE: Growing and Managing Your Business

TRACK TWO: New Professionals—Starting Strong



Dr. Penny Walters

Practical Approaches to Building a Multi-faceted Genealogy Business

Dr. Penny Walters

This session will help professional genealogists turn research skills into multiple revenue streams while maintaining ethical standards. Attendees will learn to expand services—consultations, workshops, writing, and collaborations—apply marketing strategies, grow client reach, and increase income. By the end, participants will have actionable tools to diversify and strengthen their practice.



Melissa Harrison

From First Client to Lifelong Client: Building a Genealogy Workflow That Encourages Repeat Business

Melissa Harrison

Move beyond chatbots to build a sophisticated AI-driven marketing system. Learn how to automate high-quality content, streamline client acquisition, and scale your brand presence without losing your authentic professional voice. This session focuses on practical, ethical AI workflows designed to grow your business while you focus on research.

Thursday, 15 October 2026 11–11:30 a.m. EDT **Break**

COURSE DETAILS

THURSDAY, 15 OCTOBER 2026

Thursday, 15 October 2026 11:20 a.m.–12:30 p.m. EDT

TRACK ONE: Growing and Managing Your Business

TRACK TWO: New Professionals—Starting Strong



Laura Cubbage Draper, CG®

Smarter Not Harder: Creating Systems for Your Genealogy Business

Laura Cubbage-Draper, CG®

'You do not rise to the level of your goals, you fall to the

level of your systems.' (James Clear)

Professional genealogists must efficiently manage time, tasks, and information. This lecture encompasses the places and methods for creating systems-structured, repeatable processes-to generate more effective and joyful work.



Diana Elder, AG®, AGL

Easy CRM Tools: Managing Client Projects and Contractors with Google Sheets and Airtable

Diana Elder, AG®, AGL

Discover free, accessible tools to organize your genealogy business from day one. This lecture walks new professionals through practical workflows using Google Sheets and Airtable to manage client projects, track progress, and coordinate with interns and contractors—no expensive software required.

COURSE DETAILS

THURSDAY, 15 OCTOBER 2026

Thursday, 15 October 2026 12:30–1:15 p.m. EDT — Lunchtime Panels

TRACK ONE: Growing and Managing Your Business

Lunch and Genealogy Credentials Panel

Designed for established professionals, this lunchtime session explores how credentials support growth, credibility, and long-term success. It provides access to credentialed individuals and fosters meaningful discussion, shared experiences, and questions about maintaining standards, expanding expertise, and continued professional development. Panelists are shown below.



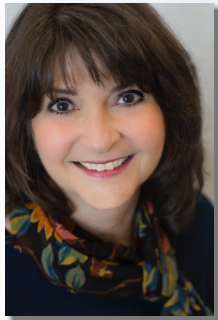
**Angela Packer
McGhie, CG®,
FUGA**



Lisa Stokes, AG®



**Nicole LaRue,
CG®, AG®**



**Cinda
Baxter,
MSc, CG®,
AG®, QG**

TRACK TWO: New Professionals—Starting Strong

Lunch and New Professionals Panel on Credentials

New professionals often feel unsure where to begin. This informal, bring-your-own lunch session invites open discussion about credentials, readiness, and benefits. Participants will gain clarity on AG® and CG® pathways and leave with practical next steps in a supportive, low-pressure environment. Panelists are shown below.



**Jan Joyce, CG®,
CGLSM, AG®**



**Charlotte
Champenois,
AG®, AGL™**



Cairenn Binder, MS, AIGG

COURSE DETAILS

THURSDAY, 15 OCTOBER 2026

Thursday, 15 October 2026 1:20 –2:25 p.m. EDT — Tip Talks



**Bryna O'Sullivan,
PLCGS**

TIP TALK: Lineage Society Application Standards for Professionals

Bryna O'Sullivan, PLCGS

Lineage society applications have their own standards for sources, analysis, and documentation. This presentation will touch briefly on each.



Fiona Brooker

TIP TALK: Beyond Research: Building a Filing System that Works

Fiona Brooker

A well-structured filing system is essential for running an efficient genealogy business, yet it is often overlooked. Introducing a simple, practical approach to organising your files so you can find what you need quickly and reduce duplication. Resulting in a system supporting both your research and your business operations.

Thursday, 15 October 2026 2:25–2:45 p.m. EDT **Break**

COURSE DETAILS

THURSDAY, 15 OCTOBER 2026

Thursday, 15 October 2026 2:45–3:45 p.m. EDT

TRACK ONE: Growing and Managing Your Business

TRACK TWO: New Professionals—Starting Strong



Maggie Gaffney

From Invisible to In-Demand: SEO Strategies for Genealogists

Maggie Gaffney

You've built your website—but can clients find it? This practical, jargon-free session demystifies Search Engine Optimisation for

genealogists, covering keyword research, website optimisation, blogging, backlinks, and free monitoring tools. Leave with an actionable roadmap to increase your online visibility and turn search traffic into paying clients.



Jill Nock, AG®

Client Communication: Writing Reports That Educate and Satisfy

Jill Nock, AG®

A professional genealogy report is more than a research

deliverable—it is the foundation of the client relationship. Using a real three-phase case study, this presentation shows new professionals how to structure reports that communicate value, manage client expectations, and build a practice through clarity, professionalism, and client trust.

Thursday, 15 October 2026 3:45–4 p.m. EDT **Break**

COURSE DETAILS

THURSDAY, 15 OCTOBER 2026

Thursday, 15 October 2026 4–5 p.m. EDT

TRACK ONE: Growing and Managing Your Business

PANEL: From Concept to Classroom: Genealogists Share How They Built Courses that Teach and Inspire



**Diana Elder,
AG®, AGL**

Are you ready to turn your expertise into a course? Four professional genealogists share their experiences creating courses for institutes, universities, and independent platforms. Learn what it takes to design, launch, and sustain a course that serves your students and supports your business. Panelists: Diana Elder, AG, AGL; Sue McNelly, AG®, Angela Packer McGhie, CG®, FUGA, and Jan Joyce, CG®, CGLSM, AG®.



**Sue McNelly,
AG®**



**Angela Packer
McGhie, CG®,
FUGA**



**Jan Joyce,
CG®, CGLSM,
AG®**

TRACK TWO: New Professionals—Starting Strong



Kate Penney Howard

From Stage Fright to Spotlight: Become a Genealogical Speaker

Kate Penney Howard

Speaking is a powerful path to income, visibility, and professional growth. We will discuss how to

begin and develop a speaking career, from selecting topics and crafting proposals to building relationships with organizations and delivering engaging presentations, exploring practical strategies for establishing yourself and turning expertise into sustainable opportunities.

Thursday, 15 October 2026 5–6 p.m. EDT **Game**

COURSE DETAILS

FRIDAY, 16 OCTOBER 2026

Friday, 16 October 2026 9–9:30 a.m. EDT

Gold Sponsor Session: Vivid-Pix



Friday, 16 October 2026 9:30–10 a.m. EDT

TBA

Friday, 16 October 2026 10–10:15 a.m. EDT Break

DAY TWO – CHOOSE A TRACK (or mix and match)

TRACK ONE: Technology

TRACK TWO: Niches

COURSE DETAILS

FRIDAY, 16 OCTOBER 2026

Friday, 16 October 2026 10:15–11:15 a.m. EDT

TRACK ONE: Technology

TRACK TWO: Niches



Kaitlyn Pauley

Using NotebookLM as a Research Assistant

Kaitlyn Pauley

NotebookLM can serve as a powerful research assistant for professional genealogists. This session

demonstrates how to organize sources, summarize complex documents, and support analysis using this tool. Attendees will learn practical approaches that improve efficiency and enhance the quality of client deliverables while maintaining professional standards and accuracy.

Find Your Voice: Podcasting as a Path to Community, Clients, and Credibility

Drew Smith, Mark Thompson, Nicole Dyer, and Andrew Koch

Thinking about starting a podcast? A panel of family history podcasters shares what they've learned — from gear and recording apps to finding your niche, engaging listeners, and collaborating with guests. Discover how podcasting can grow your audience, attract clients, and establish your voice in the genealogy community. Panelists: Andrew Koch, March Thompson, Nicole Dyer, and Drew Smith.



Mark Thompson



Andrew Koch



Drew Smith



Nicole Dyer

Friday, 16 October 2026 11:15–11:30 a.m. EDT **Break**

COURSE DETAILS

FRIDAY, 16 OCTOBER 2026

Friday, 16 October 2026 12:30–1:15 p.m. EDT

TRACK ONE: Technology

TRACK TWO: Niches



Protecting Client Information in the Age of AI

Mark Thompson

As professional genealogists adopt AI tools, understanding how these platforms

handle client information is no longer optional. This session explores how major AI providers store, use, and protect your information, clarifies common misconceptions, and provides practical guidance for managing privacy and security risks.

Mark Thompson



Stop Chasing Every Client: How Specialization Strengthens Your Genealogy Business

Jennifer Dunn

Jennifer Dunn

Many genealogists operate as generalists by default. But this session examines the business case for specialization. We'll talk about how choosing a focused niche strengthens branding, pricing power, workflow efficiency, and authority. Attendees will leave with practical strategies to identify, test, and implement a profitable genealogy specialization.

Friday, 16 October 2026 12:30 p.m.–1:30 p.m. EDT

Lunch Break

COURSE DETAILS

FRIDAY, 16 OCTOBER 2026

Friday, 16 October 2026 1:20–2:25 p.m. EDT

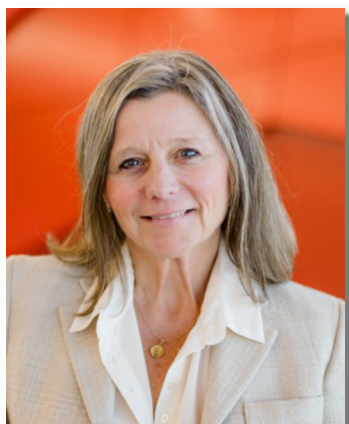


Dr. Tamiqia Simon

Tip Talk: From Records to Restoration: A Trauma-Informed Approach to Genealogical Practice

Dr. Tamiqia Simon

This presentation equips professional genealogists with trauma-informed communication strategies for delivering sensitive discoveries ethically and compassionately. Attendees will learn how to prepare clients for difficult findings, protect privacy, reduce liability risks, and strengthen trust while navigating identity disruptions, DNA surprises, and historically traumatic narratives encountered in genealogical research.



Lisa Vogele

Tip Talk: Have Tree, Will Travel! Important Factors When Adding Heritage Travel to Your Genealogy Business

Lisa Vogele

Learn how to expand genealogical services through heritage travel while managing risk. This session covers a checklist of important items to consider when adding travel services to your business, including legal compliance, seller-of-travel laws, insurance requirements, and operational considerations for designing, booking, or operating group heritage trips.

Friday, 16 October 2026 2:25–2:45 p.m. EDT **Break**

COURSE DETAILS

FRIDAY, 16 OCTOBER 2026

Friday, 16 October 2026 2:45–3:45 p.m. EDT

TRACK ONE: Technology

TRACK TWO: Niches



Kelly Bennett

AI Guardrails for Genealogy Research: What Every Professional Genealogist Needs to Know Before Using AI

Kelly Bennett

AI tools are powerful, but using them safely

requires more than curiosity. This presentation covers what every professional genealogist needs to know before integrating AI into their practice, including data privacy, intellectual property, hallucinations, source citations, and the hidden risks of AI tool integration, with practical guardrails.



Rhonda Lauritzen

Printing and Publishing Paths

Rhonda Lauritzen

Are you gearing up to print a project or publish a book for sale? Every big project deserves a beautiful treatment.

This class will walk through options for printing and publishing. We'll weigh the pros and cons, outlining the costs, margins, and logistics, also covering layout software and services.

Friday, 16 October 2026 3:45–4 p.m. EDT **Break**

COURSE DETAILS

FRIDAY, 16 OCTOBER 2026

Friday, 16 October 2026 4–5 p.m. EDT

TRACK ONE: Technology

TRACK TWO: Niches



Carla Cegielski

Accessibility for Client Reports

Carla Cegielski

Stand out from other Genealogists. Offering accessible reports is a selling point for over 25% of your client base. This presentation focuses on the importance of accessibility and how to attain it.



Dr. Shannon Combs-Bennett, PhD, QG, FSAScot.

Speaking as a Business: Managing, Pricing, and Growing Your Income Stream

Shannon Combs-Bennett, PhD, QG, FSAScot.

Speaking can be a significant revenue stream for professional genealogists, but only if managed like a business. This lecture covers setting honorarium, negotiating contracts, managing bookings, building a speaker brand, and tracking income, giving you the tools to treat your lecturing work as the professional business it should be.

Friday, 16 October 2026 5–5:30 p.m. EDT **Closing Remarks**

WORKSHOPS

Optional Workshops – Saturday, 17 October 2026

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.



Katherine O'Connell

Saturday, 17 October 2026 10 a.m.–12:30 p.m. EDT

Developing Business Workflows

Katherine O'Connell

As a new professional, it can be very exciting to land a new client. But there are a lot of steps between that first phone call and submitting a report or final work product. This workshop will help you plan the way forward: what to ask the client when onboarding, how to send out a contract and retainer invoice, when to send updates, when to bill, and how to send out a report and close out the case. Having a process will help you feel confident and set the client at ease. This workshop will give you a chance to work through the steps and ensure that everything goes smoothly.

Saturday, 17 October 2026 12:30–2 p.m. EDT

Lunch

WORKSHOPS

Optional Workshops – Saturday, 17 October 2026

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.



Kate Penney Howard

Saturday, 17 October 2026 10 a.m.–12:30 p.m. EDT

When Family History Hurts: Trauma-Informed Genealogy and the Unreasonably Exhausted Researcher

Kate Penney Howard

Genealogical research often uncovers difficult truths. This interactive workshop uses case studies and guided discussion to introduce trauma-informed approaches to communication, ethics, and researcher well-being. Participants will practice responding to sensitive scenarios, setting boundaries, and leave with practical strategies to support clients while maintaining sustainable, professional genealogical practice.

Saturday, 17 October 2026 12:30–2 p.m. EDT

Lunch Break

WORKSHOPS

Optional Workshops – Saturday, 17 October 2026

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.



Andrew Redfern

Saturday, 17 October 2026 2–4:30 p.m. EDT

Advanced PowerPoint Skills for Professional Genealogists

Andrew Redfern

Learn advanced PowerPoint techniques to create polished presentations, stronger client visuals, and reusable branded assets for your genealogy business. This hands-on workshop will help you improve slide design, build efficient workflows, and repurpose research into professional, engaging outputs for lectures, webinars, reports, and educational offerings.

WORKSHOPS

Optional Workshops – Saturday, 17 October 2026

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.



Nicole Dyer

Friday, 16 October 2026 2–4:30 p.m. EDT

Airtable Meets AI: Smarter Transcription & Research Logging

Nicole Dyer

AI tools inside Airtable can make your research logging and report writing workflow faster and more efficient. AI Field Agents analyze handwritten documents, transcribe them, and generate summaries automatically. Use Omni to chat about your data, build tables, create source citations, and draft research paragraphs from your log.