

ABSTRACTING DOCUMENTS: UNDERSTANDING ABSTRACTS PARTS I–III FOR ROOTSTECH 2022

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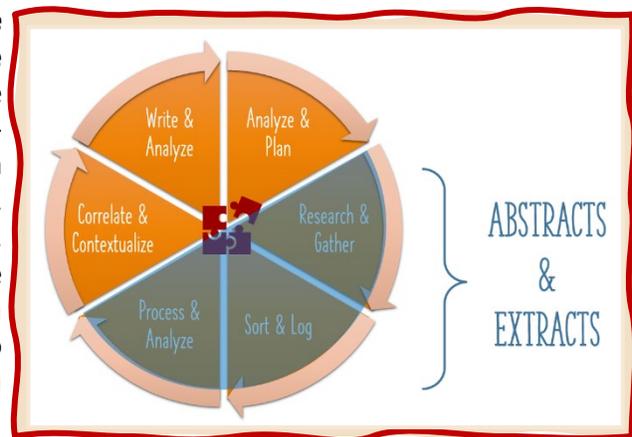
Value of Abstracting in Genealogical Research

What purpose does transcribing have? Is it not good enough to just read quickly through a document and take a few notes? No – transcriptions allow us to take time to read carefully, write, and mentally “ingest” the information and thoughtfully analyze the content. A transcription is a complete typed word-for-word, all-the-dots-and-squiggles, reproduction of the document. Two shorter variants are used by genealogists for their own notes, publications of large compilations, or as references to the original documents. These are called **abstracts** and **extracts**.

ABSTRACTS & EXTRACTS

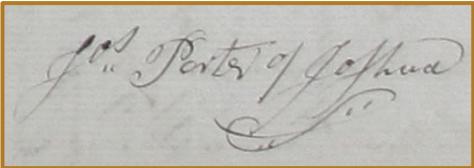
ABSTRACTS are a summary, or an abbreviated form of the original, that preserves the most important qualities of the original accurately and completely enough for review. Abstracts may contain quoted sections or phrases that are critical to the preservation of the intent of the original, and those quoted sections are kept within quotation marks and called an **EXTRACT**. Extracts follow the same rules as transcriptions to maintain the exact spellings, punctuation, diacritical marks, etc., within the quotation marks.

Abstracts are tools for standardizing note taking of important information within the documents we most commonly use. We therefore need somewhere to put the abstracts – for this we employ **research logs** and **research plans** in our everyday process of gathering, sorting, analyzing, and hunting for information. Taking time to transcribe allows (read: forces) the researcher to absorb the content and slow down to think. Abstracting permits the researcher to condense and inventory the relevant information and analyze why or if it may be important.



CRAFTING ABSTRACTS

Mary McCampbell Bell’s chapter “Transcripts and Abstracts” in *Professional Genealogy* (2001 edition) is considered by many to be one of the most complete on the subject. It is a recommended read for any working in the profession. There are some basic conditions that are recommended generally for crafting an abstract from an original document. The style shown in the chapter is not the only way to abstract; researchers have latitude depending on the needs of the document and research purpose.

- **DOCUMENT IDENTIFICATION.** Just as with the transcription, place a header to state the type and name of the document, location (country, state, county), record location (book & page), and relevant dates. Some researchers recommend creating a full CITATION in addition to the header. When in doubt, a full citation is more critical than a header.
- **NAMES & SPELLINGS.** Keep name spellings intact just as stated in the document, including all abbreviations, or if followed by a descriptor such as "Ja^s of Joshua." If the same name is spelled differently in the same document, include both. Many abstractors, especially those who publish compilations of large record groups, such as a set of wills from a particular county, will set surnames, or surnames and given names, in capital letters to assist readers to scan pages easily. Bell recommends that because some surnames used lowercase and uppercase letters, this can confuse, such as the name "van der Vleet" would be recorded as "VAN DER VLEET." Using a combination of point sizes can help or using the "Small Caps" effect under the Font tab results in a compromise: "VAN DER VLEET" which both catches the eye and is more closely aligned to the originally intended spelling.
- **SIGNATURES.** With modern technology, it is easy to screen capture original signatures to include with transcriptions. It is *not* required to screen capture, but some prefer it. Screen captures of signatures may be kept with abstracts as well as a critical piece of identification. Most times researchers will be faced with a clerk's copy of a signature or X for "his mark." If an ancestor can or cannot sign their name, record it faithfully as well.
 
- **RELEVANT INFORMATION FROM THE DOCUMENT.** What is in this document that needs to be preserved in research notes? The terms of the will, location of the land, relationships, inventory of the estate? Summarize legal addenda such as dower releases in deeds, renunciations in probated estates, and where a document was recorded, especially if in more than one location or duplicated in separate court jurisdictions (for example, a deed recorded in the ancestor's current county of residence for a property sold in another county/state and recorded by that register of deeds as well).
- **KEEP CONTENT ORDER INTACT.** Sometimes it isn't just what the document says, but *when* it says it that matters. Attempt to keep the information in the same order as it was in the original document. It may not always matter, but often does for cases of probate or court documents.
- **DOCUMENT EXTRACTS.** Some sections need to be copied exactly because of its relevance. Or language in a section is ambiguous and needs research. The line breaks do not need to be followed as in a transcription, however.
- **PHYSICAL CLUES IN THE DOCUMENT.** Address any questions of integrity or reliability in the document itself. For example, mention if the document is original, a clerk's copy, or part of an authored work. Are there tears, readability issues (bleed through, ink blots) that affect the content of the information?

MORE ART THAN SCIENCE. There are a lot of right ways to transcribe and abstract, but also ways that fall short of standards. Compare samples at the Board for Certification of Genealogists® webpage, "Document Analysis Skills" for sample documents, copies of the transcription, and then practice abstracting: "Test Your Document Skills," *Board for Certification of Genealogists*, <https://bcgcertification.org/learning/skills/skilltest/>. Note that the format approaches in these differ

some from Bell's advice but are acceptable because they follow Standards 19–36 in *Genealogy Standards*.¹



“Skilled transcripts and abstracts are the very foundation upon which reliable research is built.”

- Mary McCampbell Bell

HOW MUCH INFORMATION IS RELEVANT FOR AN ABSTRACT?

The easiest way to begin an abstract is to begin with the transcription you have created, then remove sections or phrases that are less relevant to the main topic and intent of the document's purpose. Much of the “legaleze” that dictates the contracts of wills and deeds can be excised; it is called “boilerplate.” Then decide which, if any parts should be included as extracts within quotes, and summarize the rest – succinctly, accurately, and without alteration to the original intent. Advice in *Genealogy Standards*, Standards 23–27 & 29–33 contains these ideas (paraphrased), among others:

- Distinguish between source content and one's own interpretation.
- Reserve bias & forming a conclusion until all relevant information has been collected.
- Omit the “redundant, repetitive, and formulaic wording.” Preserve the essential information.
- Clearly identify between abstracted and extracted material.
- Honor the original spellings and meanings of words, names, abbreviations, and features.
- Summarize content without altering its original meaning.

THE STORY OF BOILERPLATE – WHAT IT WAS & WHAT IT IS NOW

In official court or legal papers (such as deeds and wills), common phrases fill much of the document. This legal phraseology is known as “boilerplate language.” It is the standardized legal wording common to documents that convey property, cash, or agreements. Being familiar with typical boilerplate can help you decipher other words on the same page.

The term “boilerplate” dates from the 1890s when newspapers relied on individual letter type that had to be laboriously laid for each printed article. Smaller local papers would receive feature stories from larger syndicates. Those syndicates delivered the complete typeset story. The story was engraved in full into a thin metal plate, rather than set letter-by-letter as most typesetting was done at the time. The metal used for this was similar to the metal sheets used to create heating boilers. It



Sample print plate advertising similar to boilerplate newsarticles; the Deer Lake Irrigated Orchard Company. Northwest Museum Arts & Culture, accession no. 3861.1, <https://www2.northwestmuseum.org/museum/deer-lake-irrigated-orchard-company-printing-plate-907.htm>.

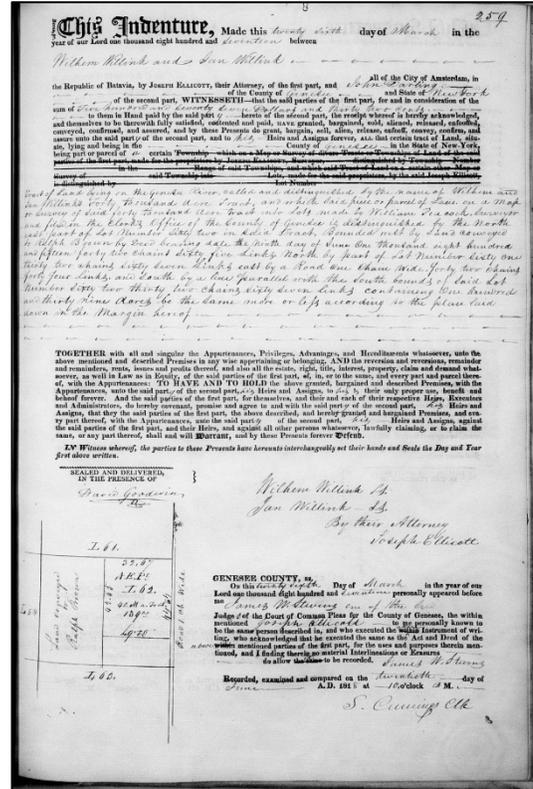
¹ Board for Certification of Genealogists. *Genealogy Standards*, Second Edition, Revised (Washington, D.C.: Ancestry.com, 2021), 15–23.

was not long before the word “boilerplate” came to mean a standardized text, usually of legal jargon in contracts. Common legalese phrases are:

- “My last will and testament...”
- “Your orator further states...”
- “...and acknowledged the within instrument of writing to be his act and deed...”

When to leave boilerplate language in or take it out?

How much of the boilerplate language to leave in or out depends largely on the context of the document. As early as the 1800s, county clerks began using books for their document copies with typeset boilerplate language already printed, with blanks for names, dates, and details. Boilerplate language reflects the laws by which the ancestor may make contracts or appeal to the court for redress. The legal terms, if ignored, may hide important facts such as guardianships, unusual stipulations for the contract, inheritance, easements and right of way, or other surprises. Boilerplate language also gives clues to the laws and restrictions that rule the creation of the document. In handwritten documents, the more accustomed to boilerplate language that we are, the easier it may be to read difficult handwriting by comparing the words to other words with unknown letter forms. For the most part, boilerplate language is excised from the abstract. We must still read it carefully though. When it changes, even slightly, reasons should be sought – what is it about this change that indicates variations in the law or hints into the personality of the ancestor? A good rule of thumb is to know at least the basics behind the creation and implementation of the laws for the documents ancestors are involved in so that unusual boilerplate language may be discovered.



Sample fill-in form deed showing boilerplate language as pre-printed. Genesee County, New York, 1817.

Crafting Your Abstract

Genealogists abstract the information from a document as part of our project’s organization and analysis. Val Greenwood, in his chapter on “Abstracting Probate and Land Records,” said that abstracting the information from a document allows the researcher “to efficiently get the required information out of the records and into your notes in a meaningful and readily usable form without omitting significant evidence.”² Knowing what to keep for the abstract is part of the researcher’s art and experience. What to preserve also depends largely on the type of document and its intended function. Most abstracts will follow a basic pattern and then vary as needed for the record type. A checklist for crafting abstracts follows.

² Val D. Greenwood, “Abstracting Probate and Land Records,” chap. 21, *The Researcher’s Guide to American Genealogy* (Baltimore: Genealogical Publishing Co., 2017), 529.

1. Craft the full source **citation**. Facts should never be found anywhere without their citation.
2. Describe the record with a **header** including names, place, and general location of the record.
3. **Transcribe** the record completely and accurately.
4. Begin the **abstract** by excising normal and unnecessary boilerplate language and repetitive language.
5. Keep contents of information in the **order** listed in the document.
6. The remaining should show a **condensed version** of the information in the documents that reliably reflects the intent of the original including:
 - Names with original spellings
 - Dates and ages, if shown
 - Locations & residence of the people involved and courts validating the records
 - Descriptions (of lands, properties, inheritances)
 - Relationships & neighbors or other named persons
 - Witnesses & court officials
 - Other relevant information, including unusual legal situations.
7. If needed, **reformat** the text with what is left behind for the abstract with the header and, if desired, clarify first and/or surnames with small and large capital letters.

DIFFERENT RECORDS – DIFFERENT TREATMENTS FOR ABSTRACTS

How might abstracts need to change or be reformatted for different types of documents? Thankfully, not too much need be changed – names, relationships, dates, locations, and other essentials are key. But additions are needed for the following, many of them may need some form of quoted extract.

Document Types	Abstracting Variation Suggestions
State-Land State deed	Metes-and-bounds description (full or partial extract)
Federal-Land State deed	Rectangular Survey System description (full or partial extract)
Probate Inventories	Lists with or without prices
Chancery/Equity Court Case File	Separate abstracts of individual pages & overall file abstract
Probate file (not in separate books)	Separate abstracts of individual pages & overall file abstract
Military Pension File	Separate abstracts of individual pages & overall file abstract

ABSTRACTING TEMPLATES

Format is a matter of researcher's personal choice. It also depends on the type of document to be abstracted to display the relevant information most effectively. Templates can help us organize and recognize significant points. **Be aware that printed templates do not apply to all situations; do not allow the order of items on a template to supersede the arrangement and order of people and information in the original document.**

The *FamilySearch Wiki* has a helpful page of printable forms at https://www.familysearch.org/wiki/en/Genealogy_Research_Forms, including ones for censuses and passenger records. Other free forms are found at the St. Louis Genealogical Society website at <https://stlgs.org/resources/on-this-site/free-research-forms-2>. A general "research extract" form is available in PDF from [Ancestry](#).

Basic Abstracting Styles

Many genealogists abstract the document information in two basic styles: narrative (paragraph form) or bullet-point, or a combination of the two.

[full citation]

_____ to _____, Quitclaim Deed
 _____ County, State
 Deed Book ____: ____
 Written _____, recorded _____ } Header

Names of grantors and grantees, _____ [Location] _____,
 [consideration] _____. Relevant details of occupation, residence, relationship, and/or
 inheritance... description of land by federal land aliquot parts and meridian or by
 state-land-state metes-and-bounds ... include unusual stipulations, rents, mortgage, or
 reversions...names of witnesses, clerk of court, dates, information about signatures,
 etc. Include quoted extracts as needed. } Info

EXAMPLE - PARAGRAPH STYLE

[full citation]

Will of _____
 _____ County, State, _____ book _____
 Written _____, proved _____ } Header

[Opening - name of testator] _____ [Location] _____

- Bequest to _____ [details & relationship] _____
- Bequest to _____ [details & relationship] _____
- Bequest to _____ [details & relationship] _____
- Other details _____
- Executor, _____, Legal addenda _____
- Witnessed by _____
- Signature information _____

} Info

EXAMPLE - BULLET STYLE



“Historical records do not speak for themselves. They cannot explain themselves. They are inert objects created by individuals of a different time, a different culture, and who-knows-what mindset. If taken at face value they can deceive mislead, or confuse. The only voice that documents have is the is the voice we give them – either through the context we provide or the passive acceptance with which we report them.” - Elizabeth Shown Mills ¹

1. Elizabeth Shown Mills, “QuickLesson 23: No. Records Do Not Speak for Themselves,” *Evidence Explained: Historical Analysis, Citation & Source Usage* (<https://www.evidenceexplained.com/content/quick-lesson-23-no-records-do-not-speak-themselves> : 17 June 2021).

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- Powell, Kimberly. "Abstracting & Transcribing Genealogical Documents: Transcription Rules and Techniques." *ThoughtCo.*, 3 July 2019. Viewable at <https://www.thoughtco.com/abstracting-and-transcribing-genealogical-documents-1421668>.
- "Test Your Document Skills." *Board for Certification of Genealogists*, BCG Learning Center. Viewable at <https://bcgcertification.org/learning/skills/skilltest/>. Applicants may test transcription and abstracting skills.



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The State of Ohio
 Lucas County, D. On this 2^d day of April A.D. 1853 in
 the Court of Probate in and for said County
 personally appeared before me C. B. Stickney
 Judge of said Court for said County and State of
 Ohio May McMillen and Eliza Martin
 residents of the State of Ohio in the County of Elie,
 who being duly sworn according to law declare that
 Esther Reynolds is the widow of Jason Reynolds
 deceased who was a Private in the Company
 of Penick First Service and Capt Asahel Smith's
 Company, ^{second Regt} but in what Regiments they do not
 know that it was in the year of 1812 so called
 in & near Buffalo & George State of New York.
 That the said Esther Reynolds was married
 to the said Jason Reynolds deceased at Galway in
 the County of Seneca State of New York on the fourth
 day of October A.D. 1810 by one Isaac Geary a
 Justice of the Peace. That the name of the ^{said} Esther
 Reynolds before her marriage as aforesaid was
 Esther McMillen that her husband the said
 Jason ~~McMillen~~ ^{Reynolds} died at Scio in the County
 of Livingston in the State of New York on the
 on the 16th day of April A.D. 1836. That the said
 is still a widow. That the said May McMillen
 for herself says that she was personally acquainted
 with said dec^d & said Esther at the time of their
 marriage as aforesaid though not present at the said
 marriage she knows the fact to be so, & has been acquaint-
 ed with them ever since, & knows that they have
 had a large family of children. And the
 said Eliza Martin says that she is one
 of said Jason Reynolds children & is twenty
 eight years of age & that from the traditionary

Affidavit of widow Esther Reynolds, for Jason Reynolds (Pvt., Capt. Penick Co., New York Militia, War of 1812), bounty land warrant application file 168,340; Case Files of Pension and Bounty Land Applications Based on Service between 1812 and 1855; Pension and Bounty Land Warrant Application Files, 1800–1960; Department of Veterans Affairs, Record Group 15; National Archives, Washington, D.C. Front of page 1 of 1.

and historical account partially handed down
 in the father family, the affidavit made
 of Esth Reynolds affirms her death on the
 4th day of Oct. 1816. is correct. Also says that
 she was present at her said father's death
 whom she saw die on the 16th day of April
 1818. They further say they are of
 lawful age & are disinterested as they truly
 believe

Mary M. Miller

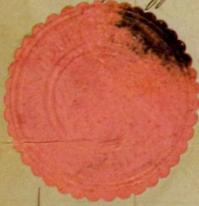
Eliza Martin

Sworn to and subscribed before

me this 2 day of April 1883 as witness my hand & seal
of office.

C. B. Stebbins

Notary Public



168,340 July 9) 53

Affidavit of widow Esther Reynolds, for Jason Reynolds (Pvt., Capt. Penick Co., New York Militia, War of 1812), bounty land warrant application file 168,340; Case Files of Pension and Bounty Land Applications Based on Service between 1812 and 1855; Pension and Bounty Land Warrant Application Files, 1800-1960; Department of Veterans Affairs, Record Group 15; National Archives, Washington, D.C. Reverse of page 1 of 1.

Affidavit of Mary McMillen & Eliza Martin, for Jason Reynolds (Pvt., Capt. Penick Co., New York Militia, War of 1812), widow Esther Reynolds, bounty land warrant application file 168,340; Case Files of Pension and Bounty Land Applications Based on Service between 1812 and 1855; Pension and Bounty Land Warrant Application Files, 1800–1960; Department of Veterans Affairs, Record Group 15; National Archives, Washington, D.C.

TRANSCRIPTION

*Esther Reynolds, widow of private Jason Reynolds, Capt. Penick Co., New York Militia, War of 1812
Huron County, Ohio*

Affidavit, Military Bounty Land Application file 168,340

Written and recorded 2 April 1853

Spelling and punctuation preserved

"The State of Ohio

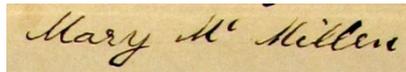
Huron County SS On this 2^d day of April AD 1853 in
 open Court of Probate in and for said County
 personally appeared before me C.B. Stickney
Judge of said Court for said County and State of
Ohio Mary M^cMillen and Eliza Martin
residents of the State of Ohio in the County of Erie,
who being duly sworn according to law declare that
Esther Reynolds is the Widow of Jason Reynolds
deceased who was a Private in the Company
of [^]Captain Penick first Service And Capt Asahel Smith's
Company [^]Second Service but in what Regiments they do not
know But it was in the war of 1812 So called
in & near Buffalo & Oswego State of New York

 That the said Esther Reynolds was married
to the said Jason Reynolds deceased, at Galway in
the County of Saratoga State of New York on the fourth
day of October A.D. 1810 by one Isaac Geer a
justice of the Peace. That the name of the [^]said Esther
Reynolds before her marriage as aforesaid was
Esther M^cMillen That her husband the said
Jason M^cMillen ^{Reynolds} died at Lecister in the County
of Livingston in the State of New York ~~on the~~
on the 16th day of April AD 1836, but that she
is still a widow. That the said Mary McMillen
for herself says that she was personally acquainted
with said dec^d & said Esther at the time of their
Marriage as aforesaid though not present at the said
Marriage she knows the fact to be so, & has been acquan-

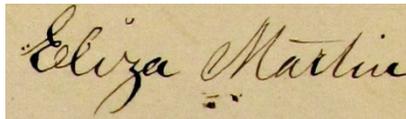
tend with them ever since, & knows that they have raised a large family of children And the same Eliza Martin says thus she is one of said Jason Reynolds children, & is twenty Eight years of age & that from the traditiary [traditional?]

[reverse side]

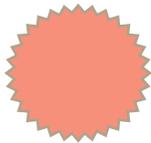
and historical account verbally handed down in her Father family the aforesaid marriage of Esther Reynolds aforesaid her Mother on the 4th day of Oct^r 1810, is correct. Also says this She was present at her said Father's death & knows that he died on the 16th day of April A.D 1836. They further say they are of lawful age & are disinterested as they verily believe [image of original signature for Mary Mc Millen]



[image of original signature for Eliza Martin]



Sworn to and subscribed before
Me this 2 day of April AD 1853 as witness my hand & seal
of office. C.B. Stickney
Probate Judge"



[Embossed seal affixed]

[Marginal notation, likely made by Pension Office Receiver bounty land number and date received:]

"168,340 July 9) 53"

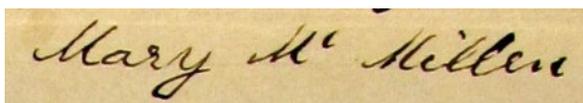
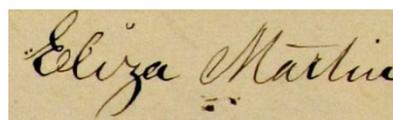
["Traditionary" is an archaic word for "traditional."]

Affidavit of Mary McMillen & Eliza Martin, for Jason Reynolds (Pvt., Capt. Penick Co., New York Militia, War of 1812), widow Esther Reynolds, bounty land warrant application file 168,340; Case Files of Pension and Bounty Land Applications Based on Service between 1812 and 1855; Pension and Bounty Land Warrant Application Files, 1800–1960; Department of Veterans Affairs, Record Group 15; National Archives, Washington, D.C.

ABSTRACT

*Esther Reynolds, widow of private Jason Reynolds (Capt. Penick Co., NY Militia, War of 1812)
Huron County, Ohio
Affidavit, Military Bounty Land Application file 168,340
Written and recorded 2 April 1853*

On 2 April 1853 at the Probate Court in Huron County, Ohio, MARY MCMILLEN and ELIZA MARTIN, both of Erie County, Ohio, swore to an affidavit on behalf of ESTHER REYNOLDS, widow of JASON REYNOLDS for application to receive bounty land. Jason said to have been a private in the War of 1812 under CAPT. PENICK'S Co. then CAPT. ASHAEL SMITH'S Co., but regiment unknown, in or near Buffalo [Erie County] and Oswego [city or county?], New York. Jason and Esther were married at Galway, Saratoga County, on 4 October 1810 by ISAAC GEER, JP. Esther's maiden name was ESTHER MCMILLEN. MARY MCMILLEN did not attend the marriage ceremony but was personally acquainted with the couple at the time. Esther is still a widow. Jason died at "Lecister" [Leicester], Livingston County, New York, on 16 April 1836. He and Esther had "raised a large family of children" including ELIZA MARTIN who stated she was 28 years old. Eliza affirmed the traditional family account of the marriage as well as personal attendance at her father's death. [Signatures of Mary and Eliza reproduced below.]

A rectangular photograph of a handwritten signature in cursive ink on aged paper. The signature reads "Mary McMillen".A rectangular photograph of a handwritten signature in cursive ink on aged paper. The signature reads "Eliza Martin".

Witnessed and sealed by the probate judge of Huron County, C. B. STICKNEY. Marginal notation "168,340 July 9) 53"
[likely by pension office receiver for bounty land number and date received]

[Contextual note: To qualify for the Act of 1850, widows of the War of 1812 must have remained unmarried, see Congressional Acts 9 Stat 520 (<https://memory.loc.gov/cgi-bin/ampage?collId=IISI&fileName=009/IISI009.db&recNum=548>).]

Affidavit of Mary McMillen & Eliza Martin, for Jason Reynolds (Pvt., Capt. Penick Co., New York Militia, War of 1812), widow Esther Reynolds, bounty land warrant application file 168,340; Case Files of Pension and Bounty Land Applications Based on Service between 1812 and 1855; Pension and Bounty Land Warrant Application Files, 1800–1960; Department of Veterans Affairs, Record Group 15; National Archives, Washington, D.C.

ABSTRACT

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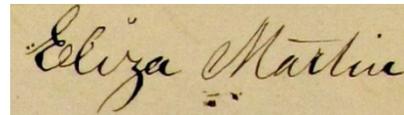
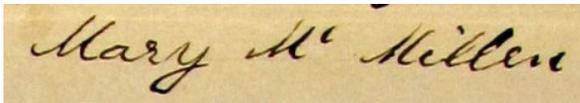
Huron County, Ohio

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- Jason was a private in the War of 1812 under CAPT. PENICK'S Co. then CAPT. ASHAEL SMITH'S Co., regiment unknown, in or near Buffalo [Erie County] and Oswego [city or county?], New York.
- Jason and Esther were married at Galway, Saratoga County, on 4 October 1810 by ISAAC GEER, JP. Esther's maiden name was ESTHER McMILLEN. MARY McMILLEN did not attend the marriage ceremony but was personally acquainted with the couple at the time. Esther is still a widow.
- Jason died at "Lecister" [Leicester], Livingston County, New York, on 16 April 1836.
- Jason and Esther had "raised a large family of children" including ELIZA MARTIN who stated she was 28 years old. Eliza affirmed the traditional family account of the marriage as well as personal attendance at her father's death.
- [Signatures of Mary and Eliza reproduced below.]



Witnessed and sealed by the probate judge of Huron County, C. B. STICKNEY. Marginal notation "168,340 July 9) 53"

[likely by pension office receiver for bounty land number and date received]

[Contextual note: To qualify for the Act of 1850, widows of the War of 1812 must have remained unmarried, see Congressional Acts 9 Stat 520 (<https://memory.loc.gov/cgi-bin/ampage?collId=llsl&fileName=009/llsl009.db&recNum=548>).]