

tmsNEWS

The Newsletter of the Metcalfe Society
No 1 January/February 2023

Welcome
to the first Newsletter of 2023
and
a Happy New year to you all.

**The first thing to mention is have you renewed your membership
due on 1st January?
If so thank you.**

**If not
you need to check the information and if necessary complete
and return the form on the following two pages to continue
to enjoy the benefits of belonging to The Metcalfe Society.**

Thank you.



Chairman's Message

Welcome to 2023

I sincerely hope that this will be a better year for all of us. At the moment, the climate seems to be working against all of us with torrential rain, mud slides, fires – you name it, across the membership, we are experiencing every type of weather.

I am pleased to say that we are hoping to hold our AGM this year as a hybrid meeting, so those of you able to travel to Yorkshire will be very welcome to come along in person, but if not, we will still be holding the meeting via Zoom. This should enable as many of you as possible to take part. It will be great to be able to meet up with more than just a few people again and I am looking forward to possibly seeing some new faces. Please put the date in your diaries, Saturday 7th October. We would like an expression of interest from you – are you likely to come along, or will you be joining online? We will need to know definite numbers for catering nearer the time, but in the meantime, it will be useful to have an idea of the number of people we need to allow for – whether we will need a box room or a large hall. If you can let me know via jo.heron@gmail.com, I would be grateful. Full details will be available in the next few months, but if you would like to know where it will be let me know as we will be making a decision in the next two weeks.

I'm pleased to say that work is continuing on several different aspect of our history, and we are also considering expanding the items for sale. We may be able to publish aspects of Metcalfe history in smaller publications than the large volumes we currently have which you may find of more immediate interest – possibly leaflets or downloads of specific information. At the last AGM, it was suggested that we might look to having another Metcalfe mug and produce a new badge – what do you think? Are there any other items you would find useful? Please do let us know – otherwise we are working blind. It would be good to have some new stock as we start to get back to meeting up and attending Fairs.

Yet again, our Editor needs your stories and the items of interest that you have come across in your research. It is easy enough to download lots of information from the internet, or to copy something that attracts your interest in a book or newspaper and pass it on to Peter – it will help him to have more than enough material, and as it online, it doesn't really make any difference if you write 3 lines or 3 pages. Photos are always welcome, so please do think whether there is anything you can share and let him have it.

Once again, welcome to 2023 and lets hope we can all capitalise on our research, and share it with other Society members.



The Metcalfe Society

Annual membership Renewal Form 2023

Please follow the guidance overleaf to complete the form

Please check overleaf for the status of your membership. There are specific actions you may need to take.

Have you paid for 2022 already? Have you set up a UK bank Standing Order? If you are a UK taxpayer, have you signed a Gift Aid declaration?

If you are unsure, please contact The Membership Secretary or the Canada/Australia agent, contact details below.

What category of membership do you wish to renew? (please circle)

Your subscription has been held at £10 (UKP) for further year

How would you like to pay your annual membership? (please circle)

1. By standing order (UK members only) – see instruction overleaf for existing or new standing orders
2. By UK £ sterling cheque
3. By other local currency cheque to our agents in Australia and Canada
4. By telephone

Alternatively, you can renew your membership online at:

www.metcalfes-online.co.uk/membership.html

How many years of membership would you like to pay?

To help you and The Society, you can pay membership for any number of years now.

Membership to start from year (state year): 2023 for how many years (state number): _____

Personal Details

Please complete to ensure that The Society holds your current details:

Name 1: (Mr/Mrs/Ms/Miss/Dr) _____

Name 2: (Mr/Mrs/Ms/Miss/Dr) _____

Full Postal Address: _____

Telephone: _____ Membership Number: _____

Email: _____

IMPORTANT NOTICE

Please be aware that from May 2018, The Society is subject to new EU legislation under a General Data Protection Regulation. This means that we cannot hold any information on members without your specific permission to do so. You will have to 'Opt In' to The Society for us to continue to hold your personal information. This will mean that without this permission, we may not be able to send you any communications from that date onwards. We would request that you tick the 'Opt In' box on this form and return to the Membership Secretary as listed below, so we can continue to send you

Newsletters and any other communications. I wish to Opt In to The Metcalfe Society ☐

Send this form & payment to the Membership Secretary below, to whom you can also address any queries.

We do have two local agents who can take currency cheques for their country:

- Ms Dianne Fox (M0113) (Australia only), e: agentaus@metcalfe.org.uk, post: 20 Old Eltham Road, Lower Plenty, Victoria 3093, Australia
- Ms Susan C M Harper (M0226) (Canada only), e: agentcdn@metcalfe.org.uk, post: 820 Rogers Court, Victoria, BC, V8X 5L4, Canada

The Metcalfe Society - www.metcalfe.org.uk

Email: membership@metcalfe.org.uk | Telephone: +44 (0) 1924 260926

Post: The Metcalfe Society, 17 Bailey Walk, Wakefield, West Yorkshire, WF4 3QW, UK

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The Metcalfe Society

Annual membership Renewal Form 2023

Please follow the guidance overleaf to complete the form

Can you all please check your membership status for accuracy, and report any problems to the Membership Secretary.

If your membership is listed here, you have already paid your membership for 2023:

0001, 0029, 0046, 0052, 0055, 0063, 0064, 0086, 0140, 0148, 0186, 0251, 0266, 0305, 0306, 0409, 0439, 0444, 0490, 0491, 0506, 0653, 0681, 0831, 0941, 1002, 1042, 1056, 1074, 1091, 1092, 1093, 1113, 1170, 1214, 1234, 1250, 1366, 1390, 1398, 1539, 1661, 1697, 1703, 1704, 1727, 1796, 1839, 1886, 1889, 1895, 1917, 1923, 1937, 1947, 1971, 1995, 2000, 2059, 2075, 2100, 2115, 2120, 2124, 2138, 2162, 2164, 2210, 2211

No further action is required.

Please check below even if you have already paid for 2022, you may need to take action regarding a Standing Order and/or Gift Aid

If your membership is listed below, you have already set up a Standing Order:

0011, 0042, 0068, 0084, 0123, 0169, 0316, 0338, 0519, 0581, 0615, 0684, 0756, 0792, 0854, 0861, 0977, 0980, 0983, 1000, 1040, 1076, 1099, 1252, 1307, 1314, 1391, 1467, 1521, 1562, 1584, 1620, 1632, 1651, 1679, 1696, 1704, 1706, 1848, 1875, 1919, 1943, 1989, 2026, 2038, 2050, 2107, 2126

Action required:

If you have an existing Standing Order, please check that it is for the correct amount, and please contact your bank to either change the date of the Order to 1st January 2023 (and each 1st January thereafter). Please advise the Membership Secretary that you have instructed your bank regarding any changes.

If you would like to set-up a Standing Order, please complete the Form which is available on the website, or by post to the Membership Secretary.

Some Standing Orders were not paid last year, have you cancelled it?

Gift Aid

Donating through Gift Aid means charities can claim an extra 25p for every £1 you give. It won't cost you as a member, or tax payer, any extra. Charities can claim Gift Aid on most donations, but [some payments](#) don't qualify. (D. Lambert)

Thank you for your additional support.

New way to pay:

From January 1st 2023, we hope to be able to take payment directly from you via the telephone. If you are happy to give us your banking details, sort and account codes and the security number, please ring 01924 260926. Transactions will be secure and details deleted once the transaction has been completed.

If you find any discrepancy between the details above and what you think is correct, please let us know.

Now, please complete the Membership Renewal Form overleaf or online and please tick the Opt In box if you wish to continue receiving communications from The Society.

HOT OFF THE PRESS

The AGM for 2023 will be held in the Golden Lion in Northallerton,

traditional County Town for North Yorkshire and home of an archive that includes many details relating to Metcalfes.

The hotel itself was a coaching inn originally and the hotel's car park will be free for residents and attendees, which is a bonus as they have a market on a Saturday in the main street.

Northallerton makes an excellent base for a researching holiday North Yorkshire, and we would love to see you at our meeting.

We will be using the Mowbray Suite for the meeting and have negotiated a potential discount, depending on the number of bedrooms booked. Currently, charges are listed as £90 for a double room and £70 for a single. All bedrooms are en suite and on the first or second floor but there is no lift, I'm afraid.

They provide an extensive lunch and dinner menu at very reasonable prices, and having tried it, the food is excellent (with 6 chefs).

We do need an expression of interest for attending the meeting, which will be a hybrid – part live and part online, so we know how to ask for the rooms to be set up.

More especially, we need to know if you will be staying at the Golden Lion, so we can benefit from the discount.

Obviously, it is early yet to be confirming bookings, but it would be helpful to have an idea for catering and accommodation.

If you could let me know then I can send you further details.

Obviously, this will not be binding - in the event of a change of circumstances.

Jo Heron

enquiries@metcalfe.org.uk

Summer 2023

With the summer coming up, and hopefully much better weather to look forward to, perhaps now is the time to start planning a visit to North Yorkshire and the villages and town associated with the Family.

Some of them, admittedly, you can drive through and hardly notice, but the family had a massive impact of the area from the lords and ladies to the ordinary working men and women.

Check out where your family originated from and search on the North Yorkshire web sites to images – it is easier to visualise what your family were doing and how they lived if you have a picture in your mind of where they lived.

In many cases, any property may well have been demolished or developed into something else, but visiting the churches and graveyards, as well as the places will help to make them real.

If you check out your record and your Birth Brief, you will have a list of places associated with your family – which makes a good start for your itinerary.

A Metcalfe Musician

Trevor Metcalfe wrote “My recently deceased cousin in Vermont, USA was not a world famous musical person, but as you can see from his obit. attached was a great musical influence in his state. Would he qualify for your “Musicians” list of Metcalfes?”

Bill loved music He was cofounder and codirector of the UVM Baroque Ensemble (1965-88), cofounder and frequent conductor of the Vermont Mozart Festival (1974-2010), and founder and conductor of the Oriana Singers (1981-2017). He conducted more Bach, Handel, Mozart and Haydn than anything else, but his repertoire spanned centuries of music, from the Middle Ages and Renaissance through contemporary works, and he had a special fondness for English music from Purcell to Britten, including, of course, G&S. Bill was made a fellow of the Vermont Academy of Arts and Sciences in 2011 and, in 2015, together with Liz, was awarded the Walter Cerf Medal for Outstanding Achievement in the Arts by the Vermont Arts Council.

Born on July 17, 1935, in Toronto, Ontario, the only child of Myrtle Reva Craig and Robert Henry Metcalfe.

William Craig Metcalfe, 1935-2021

For full obituary see

<https://www.sevendaysvt.com/vermont/obituary-william-craig-metcalfe-1935-2021/Content?oid=34407883>

the first great economic statistician

Not many know the name Gregory King.

The York University site <https://www.york.ac.uk/depts/maths/histstat/king.htm> describes him as an

English genealogist, civil servant and “the first great economic statistician.”

He does however have some uses for family historians.

Born in Lichfield in 1648, he became, at 14, a clerk to William Dugdale the antiquary and herald before in 1672 moving to London. In 1677 he was appointed Rouge Dragon Pursuivant of Arms in Ordinary in the College of Arms. He became Lancaster Herald of Arms in Ordinary in 1688 and held that post until his death in 1712.

By 1695 King had started on a second official career in the business branch of the state. He was a commissioner in charge of a new tax on marriages, births and burials and later Secretary to the Commission of Public Accounts and Secretary to the Controllers of Army Accounts;

These positions allowed him a view into the upper echelons of English society which led to his development of and insight in to the wider economic issues of the time.

In 1696 he produced a manuscript

Natural and Political Observations and Conclusions upon the State and Condition of England,

This document contains estimates of the population and wealth of England at the close of the 17th century. It describes the demographic characteristics of the population of England and Wales: age, gender, marital status, numbers of children, servants and “sojourners.” He also calculates the amount of beer, ale, and malt consumed annually in England. These estimates are based on intelligent inferences from data available to the state as a by-product of its taxing activities.

Whilst not directly aiding family historians with names it does give a good background to what the majority of the some estimated 5 million inhabitants of the survey were engaged in and is a starting point of status before the nascent Industrial Revolution exploded in the early 1700’s.

Sources: Wikipedia

The Economic History Review Volume59, Issue1 February 2006

The Economic History Review Volume66, Issue4 November 2013



the first great economic statistician 2

Gregory King's estimate of population and wealth, England and Wales, 1688

Number of families	Ranks, Degrees, Titles, and Qualifications	Heads per family	Number of persons	Yearly income per family
160	Temporal Lords	40	6,400	2,800
26	Spiritual Lords	20	520	1,300
800	Baronets	16	12,800	880
600	Knights	13	7,800	650
3,000	Esquires	10	30,000	450
12,000	Gentlemen	8	96,000	280
5,000	Persons in Offices	8	40,000	240
5,000	Persons in Offices	6	30,000	120
2,000	Merchants and Traders by Sea	8	16,000	400
8,000	Merchants and Traders by Sea*	6	48,000	200
10,000	Persons in the Law	7	70,000	140
2,000	Clergymen	6	12,000	60
8,000	Clergymen	5	40,000	45
40,000	Freeholders	7	280,000	84
140,000	Freeholders	5	700,000	50
150,000	Farmers	5	750,000	44
16,000	Persons in Sciences and Liberal Arts	5	80,000	60
40,000	Shopkeepers and Tradesmen	4½	180,000	45
60,000	Artisans and Handicrafts	4	240,000	40
5,000	Naval Officers	4	20,000	80
4,000	Military Officers	4	16,000	60
511,586		5¼	2,675,520	67
50,000	Common Seamen	3	150,000	20
364,000	Labouring People and Out Servants	3½	1,275,000	15
400,000	Cottagers and Paupers	3¼	1,300,000	6.5
35,000	Common Soldiers	2	70,000	14
849,000		3¼	2,795,000	10.5
	Vagrants		30,000	
849,000		3¼	2,825,000	10.5
511,586	Increasing the Wealth of the Kingdom	5¼	2,675,520	67
849,000	Decreasing the Wealth of the Kingdom	3¼	2,825,000	10.5
1,360,586			5,500,520	

Source: *Two Tracts* by Gregory King, ed. G. E. Barnett (Baltimore: The Johns Hopkins Press, 1936).

* This second category of maritime merchants is what King wrote; versions in which it appears as 'Merchants and Traders by Land' are subsequent alterations, though it is possible that this is what King intended.

Another Point of view!

His social hierarchy emerges as a rather crude and backward-looking stereotype based on too many intelligent guesses, with his treatment of the poorer families being least satisfactory. Overall, King's population totals appear sound, his national income estimate low, and various mean household sizes and family and children's totals unreliable. The Economic History Review Volume 59, Issue 1 February 2006

The Medal Maker

In the Society's publication **Metcalf Family Histories** there is a chapter (10) given over to Metcalfe Art & Culture; one of those Metcalfe's featured in the chapter is the artist and sculptor **Percy Metcalfe**.

Percy was born in 1893 in Wakefield the son of Graham and Elizabeth (Coverdale) Metcalfe. The article goes on to give a resume of his work touching on his work on producing a medal for the British Empire Exhibition in 1923. Percy's other work was then mentioned.

In January 2022 a series of emails between an Andy Bray and the Society (Jo Heron and Dave C Metcalfe) ensued: Andy Bray wrote " I am an admirer of the artistic skills of Percy Metcalfe (1895-1970) recently commemorated with a plaque in Wakefield. Ideally I would want to develop my knowledge of his coin and medallic art and would greatly appreciate any information about Percy that the Society could kindly share. I do have a modest collection of coins and medals designed by Percy and would happily share information about them."

Jo then referred Andy to Dave C the co-author of our Metcalfe Family Histories book. Dave responded: *I pulled together some information on Percy Metcalfe for our book 'Metcalf Family Histories' that we published in 2020. I suspect you may be well ahead of us in detail as our book has many different stories on various Metcalfe individuals and does not go into too much depth on each one. There are 4 pages of storyline on Percy which does include several photos too. I do hope you can get hold of a copy. The two key sources of information were Wikipedia and Ashstead Potters. I note in your email that you would be prepared to share information.*

Andy then provided an article "Sir Robert Johnson, The Mint and Medalling in Inter War Britain" by Christopher Eimer. Sir Robert was the Deputy Master of the Royal Mint from 1922 to 1938. He was to have a great influence on Percy's career at the Mint. Sir Robert considered that British Medal making was somewhat moribund and needed to move into the 20th century. Surrounding himself with younger and innovative designers he looked to create interesting medals.

Twenty eight year old Percy came to his attention when he put forward his successful design for BE Exhibition Medal. This was followed in 1924 with an award of 50 guineas for the League of Nations Medal and recognition for his "Lion" sculpture (see the MFH article for a photograph). Over the next four years to 1928 Percy received the Lions share of the Mint work. During this period Johnson and Percy worked closely together in the form of patron and protégé. An illustration of this was the commission to produce a medal for the visit of the Prince of Wales to Cape Town in 1924. However it was not all plain sailing.

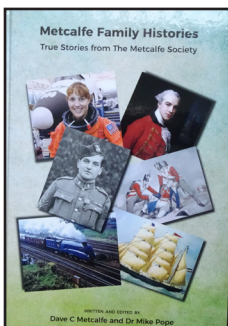
"My dear Metcalfe, I showed this rough sketch to the Mint Advisory Committee yesterday. They said that they thought it had merit but wanted me to impress upon you the necessity for guarding yourself against what they call Bolshevism, i.e. German impressionist renderings'.

Other medals produced in the period up until 1938 included: "..... from this period include King Fuad's portrait, the Henry Carslake memorial and that for the Everest flight in 1933. This last medal was commissioned by The Times which had taken a special interest in this memorable flight, and decided to make a public presentation of medals to the expedition members on their arrival home."

Percy was involved in 1934 with William Goscombe John in sittings by King George V and Queen Mary, for the commemorative and King's Silver Jubilee medals for which Percy was paid 300 guineas (Even though the King was not overly impressed with the outline of Windsor Castle on the reverse. He wanted the more traditional sceptre and crown!); the early design of Edward VIII medals and the official medal for the coronation of King George VI in 1937

After the death of Sir Robert in 1938 Percy appears to have received less commissions but was still involved with both medal and coinage design even into the reign of Queen Elizabeth II.

A gifted designer and artist.



To read more about Percy Metcalfe and other Metcalfes involved in Art & Culture why not get your copy of the Society's **Metcalf Family Histories?**

To purchase this interesting and informative publication visit our website at **www.metcalf.org.uk** for details

World War II Civilian Deaths, 1939-1945

Ancestry description: This database contains seven volumes listing civilians in the British Commonwealth and Empire who died during World War II and are commemorated on Commonwealth War Graves Commission (CWGC) memorials or buried in CWGC cemeteries.

The Commission explains these records as follows:

"These volumes contain the Roll of Honour of those civilians, citizens of the Commonwealth and Empire, who were killed in the United Kingdom by enemy action during the 1939–1945 War, while engaged in household or in business activities, or at their posts as members of the Civil Defence Services. Their graves are scattered throughout the country."

While most of these records are for the United Kingdom, they do include civilian deaths from around the world, including many lost at sea.

Following are entries for the Metcalfe surname and variants:

Robert Hall Potts Metcalf, age 7. Son of L/Cpl. **John Metcalf**, The Durham Light Infantry, and **Elizabeth J. Metcalf**, of 7 Hetton Street. 16 May 1943, at 10 Hetton Street, Sunderland, Durham.

Winifred Mary Metalf, age 55; of 39 King Street. 23 November 1940, at 39 King Street, Southampton, Hampshire.

Ernest James Metcalfe, age 25. Son of **Henry James Metcalfe**, of 36 Crosby Row, Bermondsey, and of the late **Ethel Metcalfe**. 16 January 1941, at 92 Westminster Bridge Road, Lambeth, London.

Charlotte Metcalfe, age 54; of 100 Marsden Street. Wife of **Thomas James Metcalfe**. 24 May 1943, at 100 Marsden Street, South Shields, Durham.

Stanley Metcalfe, age 14; of 100 Marsden Street. Son of **Thomas James and Charlotte Metcalfe**. 24 May 1943, 15 100 Marsden Street, South Shields, Durham.

Thomas James Metcalfe, age 63; of 100 Marsden Street. Husband of **Charlotte Metcalfe**. 24 May 1943, at 100 Marsden Street, South Shields, Durham.

Theodora Ann Metcalfe, age 34; A.R.P. Ambulance Driver. Daughter of **Maud Metcalfe**, of Dial House, Ongar Park, and of the late Brig. Gen. **Francis Edward Metcalfe**, C.B., C.M.G., D.S.O. 24 August 1940, at Dial House, Ongar Park, Ongar, Essex.

Ellen Metcalfe, age 61; of 77 Crofton Park Road, Lewisham, London. Widow of **E.C. Metcalfe**. 19 April 1941, at 77 Crofton Park Road, Lewisham, London.

John Metcalfe, age 78, of 5 Valencia Road. 29 November 1940, at 5 Valencia Road, Liverpool, Lancashire.

Norman Leslie Metcalfe, age 37; Despatch Rider, N.F.S. Son of **George and Anna Metcalfe**, of 13 Cathedral Road, Anfield; husband of **Francis E. Metcalfe**, of 38 Chepstow Street, Walton. Injured in 1942; died 29 Mar 1947, at Belmont Road Hospital, Liverpool, Lancashire.

Mary Ann Southcombe (otherwise Medcalfe), age 50; of 24 Hilton House. 19 Mar 1941, at Hilton House, Lewisham, London.

Source: Ancestry.co.uk

List compiled by S.C. Harper M0266

THE JULIAN CALENDAR

On 1 January 45BC Julius Caesar decided to introduce his own calendar by providing a leap year every four years. Previously the method of deciding the time became out of sync with the seasons. His calendar lasted until 1572 when Easter and Spring were out of step. From 2 September ELEVEN days were lost as it became 13 September! Some social unrest occurred. It also meant the tax year went from 25 March to 5 April.

NOW THEN 5

DEATH DUTY REGISTERS AND THEIR INDEXES

Benjamin Franklin is famous for his remark in 1789: "In this world nothing can be said to be certain, except death and taxes". In previous articles in the newsletter I have tried to explain what happened when someone died with or without a Will, how to discover what documents might have survived and how they can help in researching your family history. In this article I hope to show how records of 'taxes' might help you, specifically the use of 'Death Duty registers'. They can add, if you are fortunate, to information about your family. The expression 'Death Duty registers' includes as we will see several duties or taxes but starts with the original Legacy Duty collected in 1796.

In 1796 William Pitt, the younger, wanted to raise extra revenue to pay for the war against Napoleon Bonaparte. He introduced modifications to a pre-existing duty called Legacy Duty and the way in which it was collected. For the first time executors had to submit to the Treasury an account for the property that descended following a death.

In the Indexes to which I refer below, there are 2,008 entries for Metcalfes (all variant spellings) in the period covered from 1796 until 1903. The Death Duty registers are held at The National Archives (TNA) and for our purposes comprise 2 series, namely IR 26 the REGISTERS and IR 27 the INDEXES TO REGISTERS. The records contain the names of 3,377,363 individuals whose Wills incurred death duties.

Who was taxed? Over the years from 1796 to 1815 various individuals were exempt from having to pay the Duty. So not all estates were charged and many do not feature in the early Death Duty Registers for this reason. From 1796 until 1805 no duty was charged on inheritances (gifts of cash or assets, excluding freehold land, under a Will or passing under the rules of intestacy) to close family members, defined as being the deceased's surviving spouse, children, parents and grandparents. It was charged therefore on a relatively small number of estates, where distant or non-family members were inheritors.

In 1805 the Legacy Duty Act varied the exemption so that surviving spouses and parents of a deceased were the only persons exempted. Children had to pay the duty, as did grandparents for the first time. In 1815, the Stamp Act of that year, curtailed the exemption further and only spouses were exempt.

The tax was levied on assets passing under a Will or Intestacy to individuals who were not exempt from the Duty. The 1805 and 1815 Acts extended Legacy Duty to cash legacies and residues left in Wills, which had to be raised by the sale of freehold land. The Duty was not however otherwise assessed on freehold property that was left (devised), as land, to a non-exempt beneficiary. A second Death Duty called Succession Duty, created by the Succession Duty Act 1853, was levied where a person acquired property on death. All types of property were included: personal property and freehold or leasehold land of a deceased. The Duty was assessed on the transfer of land to a deceased's heir or someone else. Estates worth under £100 were exempt from paying this duty. In practice Succession Duty was collected until 1949.

Note that entries for Succession Duty in the Indexes can relate to Wills proved many years before 1853, since the Duty applied when land transferred following a death that occurred after 1853. The land in question could be subject to the terms of an earlier Will. It was this second death that triggered the Succession Duty claim.

A third Death Duty was introduced in 1894, called Estate Duty. This was introduced by the Finance Act of that year. Estate Duty was levied on all types of assets including freehold land and personal property. It was chargeable on the value of property passing on death, without regard to the relationship of the beneficiaries to the deceased. The tax replaced in 1975 with the introduction of Capital Transfer Tax which itself was in turn replaced by the current Inheritance Tax.

The Death Duty Registers available to researchers cover the period from 1796 until 1903 and reflect the collection of the three Death Duties of Legacy Duty, Succession Duty and Estate Duty.

Why should you research the Death Duties Registers?

For many years the best way to locate a proved Will or the Grant of Letters of Administration was to consult in TNA the series IR 27, which was the Index to the Registers themselves. It was in effect a countrywide probate index from 1796 until 1858, when the Probate Court was created and annual calendars of grants issued. The IR 27 Indexes are more useful after the amendments of 1815, since all legatees apart from a surviving spouse could be charged with Legacy Duty at a rate dependent upon how closely related they were to the deceased.

Prior to 1857, grants of representation (Probate or Letters of Administration) were issued by 300 local 'country' Church Courts or one of the 2 Prerogative Courts of Canterbury (PCC) or York (PCY). Each country court had its own index of estates left by Will and for intestates (Letters of Administration) for the period 1796 to 1857.

The Indexes IR 27 held by TNA have been digitised for the 'country courts', albeit for the relatively short period 1796 to 1811, and are accessible online from the TNA website. In addition subscribers to Findmypast can see the 'country court' Indexes IR 27 covering the longer period 1796-1903. The Prerogative Court of Canterbury (PCC) Death Duty Records including the indexes in IR 27 have not been digitised but one can search for records in PCC online on the TNA site and for a fee obtain a copy of the Will.

A visit to Kew or online Discovery Search can identify the actual registers in IR 26. These Indexes provide you with the Register and a folio number which you need in order to locate the correct entry in the 8,000 or so Death Duties Registers filed in IR 26. The TNA class list for IR 26 will direct you to the piece number for Wills, and with knowledge of the year of the grant for the relevant surname, the location of the piece number containing the relevant Register can be ascertained. See an explanation in Mark Herber's "Ancestral Trails" page 196 and the TNA Guide.

A word of warning! The Indexes in IR 27 and the Registers themselves in IR 26 are not always easy to use. The officers used a large number of initials and abbreviations rather than complete references, especially in the Registers themselves. The TNA Guides in book form and online referred to below in the bibliography should be consulted as a large number of explanations are given to assist the researcher.

The Indexes in IR 27 usually include the following details:

- Name of deceased
- Residence of deceased
- Date of grant
- Name of executor and their residence
- Country court where the grant was issued

You should bear the following in mind it is suggested by Grannum and Taylor in their TNA guide on Wills and Probate records (details below).

- The date of the entry is not the date of death but the date when the grant of representation was issued by the court
- An index entry without a folio reference means no tax was payable (possibly due to size of estate or the fact that beneficiaries were exempt.) The initials NE means 'no entry' or no tax payable.
- No duty was paid where the personal estate of the deceased did not exceed £20 in the period 1796-1811

What about the registers?

The Registers in IR 26 were microfilmed by TNA up to 1857, and these films have been digitised by FamilySearch. You can view the digitised images prior to 1858 (IR 26) at Family History Centres worldwide, and at FamilySearch Affiliate Libraries, including TNA. After 1858 the original Registers have not been digitised, or made available on microfilm. You will need to visit TNA in Kew to see the original registers IR 26 or use the Discovery search facility on the TNA website, obtain a quote and order a copy of the entry through the post. The Register number for the year of grant and the folio reference found in the Index IR 27 will be required to locate the register entry in IR 26.

The Registers after 1811 in IR 26 contain details spread over two pages with two column headings. Under the first column heading are details of the deceased, date of death, date of will, residence of deceased, the name of the court where the Will / Letters of Administration were granted and the date of the grant plus the approximate value of the estate.

Under the second set of column headings you will find a plethora of information. These were the civil servants' registers with annotations and observations. The explanation of consanguinity of legatee to the deceased (to enable the duty to be assessed) is really helpful; illegitimate children are stated to be thus: Stra NC [which means stranger, natural child]. Identity of legatees may be explained. For example cousins referred to in a Will thus, may be said to be DBM [which means descendant of brother of mother].

Also unnamed 'children' in the Will will be named in the register. The age of an annuitant left an annuity will be stated. Dates of later deaths of beneficiaries and marriages will be found. The registers can be useful in supplementing details of individuals under Intestacies. The Registers will show identify who received what share under the intestacy and names and addresses of children may be given. Changes to legatees' addresses over years may be annotated when the Revenue was chasing for the duty owed.

There are gaps in the Registers of administrations for the period 1863 to 1881. A fire in 1894 has resulted in 11 of the Succession Duty Registers for that year being destroyed. The files after 1903 have been destroyed and no longer exist.

Not at first easy to use but well worth the effort!

The following books and guides have been used in writing this article. The TNA guides are indispensable.

Useful bibliography and links

1. For a resume of the types of inheritance taxes introduced from the 17th century <https://finalduties.co.uk/the-history-of-inheritance-tax/>
2. The National Archives Wills and Probate Records: A guide for family historians by Karen Grannum and Nigel Taylor (2nd edition pages 82-97 chapter 7 in particular)
3. TNA website online research guide to death duties: <https://www.nationalarchives.gov.uk/help-with-your-research/research-guides/death-duties-1796-1903/>
4. An introduction to Affection Defying the Power of Death: Wills, Probate and Death Duty Records by Jane Cox. Published by the Federation of Family History Societies reprinted 1998. pp 34 to 39 in particular.
5. Probate Jurisdictions : where to look for Wills by Jeremy Gibson and Stuart Raymond. Published by The Family History Partnership (now Family History Federation) 6th edition.2016
6. "Ancestral trials" by Mark D Herber. 2000 paperback edition. Published by Sutton Publishing in association with Society of Genealogists.

David Lambert

From the Archives

In the back issues of the Mecca News are a number of articles written by early members which could be of interest to the current membership. In this item from MN 8 in December 1982 Helen Offer looks at entries from the early Census returns.

CURIOSITIES OF THE CENSUS

I have recently been indexing the Metcalfes in the 1841, 1851 and 1861 censuses for Swaledale sent me by Mrs Nina Benson and they have revealed some interesting sidelights on our forbears when seen in conjunction, as here.

For instance, in the 1841 census, why did L.W.Metcalf of Muker, aged 63, independent, not give the names of himself and the other male members of his presumed family but only their initials but gave the names of the two female members? This was the first census when persons were named and many people thought the whole idea blasphemous, and he, the son of the Vicar of Muker, as we know from a member's pedigree, may well have done so, and registered his protest thus. But then, why the names of the females? Was he a stern Victorian paterfamilias regarding females of less account and therefore the recording of their names less blasphemous? It was lucky for our researches that he did so, for it identified beyond shadow of doubt his family and has added another marriage to a pedigree.

An even more reticent Metcalfe in the 1851 census is Henery (spelt thus even in the 1841 census when he was living at Muker, aged 24, lead miner, with his parents and family) still living at Muker having been born there, now aged 34, lead miner, married with a wife aged 28 and a daughter aged 6, both born in Muker, but Henery has refused to give their names. Again why?

In Kearton in 1841, John Metcalfe, aged 50, lead miner, lived with his presumed wife Elizabeth, five children and Jane Watters, independent aged 55. Mrs Benson has added a note that according to the Mormon microfiches John had married Elizabeth Watters on the 11th October 1814 at Grinton. His three younger children were Elizabeth aged 11, James aged 9 and Matthew aged 5. In the 1851 census at Kearton there is an entry for Elizabeth Watters, head, unmarried, aged 21, James Watters, brother unmarried aged 18, Watters Metcalfe, brother, unmarried aged 16 lead miner and Jane Watters, aunt, unmarried aged 67, pauper, all born in Melbecks. What is the story behind this change of name? George and John, the two older children, who were also born at Melbecks have not changed their surnames, but are living with their wives - George in Blades with their children and John still in Kearton. And why did Matthew rebel against the decision to the extent of keeping his father's surname but changing his christian name to Watters? One has the idea of an aunt who disliked intensely her younger sister's husband.

John and his wife Elizabeth, who were 50 and 45 respectively in 1841, did not appear in the 1851 census.

It is interesting to follow the progress of a family. John was a young farmer of 25 years living at Spring End with his wife Mary aged 20 and six month old son George. In 1851 John did not appear in the Swaledale census, but Mary described herself as a farmer's wife born at Gurnerside, aged 32 with son George aged 10 and four other children, the youngest being a daughter of 11 months, all born at Spring End, and a 16 year old servant. In 1861 John is still not there, but now we can see the reason. Mary is a cattle dealer's wife and George, aged 20 is a cattle dealer's son, and there is another daughter aged 8. In 1871 John is at home describing himself now as a farmer aged 59, farming 87 acres, with his wife Mary aged 52 and four of his six children, the two elder sons having left home. His travelling days are over and he is content to be a plain farmer.

**You can access back issues of the Mecca News
together with the associated indexes on the society's website.**

Sailing to America

"DEPARTURE OF THE FIRST COMPANY OF THE SEASON. -- The first installment of this season's emigration left Liverpool, on the Guion S. S. Wyoming, on Saturday, April 19th, for the land of Zion.

Early on the afternoon of that day, a meeting of the elders onboard was called by President Budge, and held in one of the saloons of the vessel. Besides the missionaries released to return home with the company, there were present, president Budge and Elders John Nicholson, Francis Cope, James L. Bunting, George H. Taylor and Henry Rolapp.

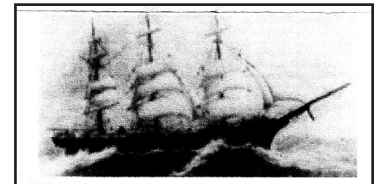
*Besides the officers, already named, the following returning elders are with the company: W. S. Burton, Daniel Jacobs, . B. Wheelwright, **John E. Metcalf**, John R. Twelves, Joseph O. Young, Willard E. Weihe, W. D. Major. The company, besides the elders numbers 157 persons 132 of whom are English; 16 Welsh and 1 Scotch, making a total, including returning missionaries, of 170 SOULS .*

The visitors to the vessel bid adieu to their friends who whereabouts leaving and the ship steamed out of the Mersey within a couple of hours afterwards.

Sat . 19 [Apr. 1879] The steamship Wyoming sailed from Liverpool, England, with 170 Saints,. The company arrived at New York April 30th, and at Salt Lake City May 8th."

http://mormonmigration.lib.byu.edu/Search/showDetailsldb:MM_MII/t:accounUid:1477Ikeywords:metcalf

This is an extract from the website Mormon Migration. The website lists around two dozen Metcalfes arriving in the USA between 1853 and 1911. The earlier route was from Liverpool to New Orleans then up the Mississippi to Utah but in 1864 a route from Liverpool to the East coast of America was developed and became the preferred entry to the USA. There was however in 1856 a small group of Metcalfes who arrived in New Orleans from Sydney



Australia. Many of the Metcalfes are shown to be from York, Leeds and other Yorkshire locations.

The site holds interesting details and has journals from many of the Mormon travellers recalling their journeys across the Atlantic and then to Utah. If you have any Mormon antecedents,, have "lost" any ancestors in the period indicated it might be worth a look. If nothing else the journals are worth perusing.

There is another site which lists details of sailings **Saints By Sea**. It may be useful.



Websites

New site – Yorkshire Dales Families:

<https://spensley.tribalpages.com/tribe/browse?userid=spensley&view=9&pid=1529&ver=106469>

This is a site that was created in 2009, and updated as recently as the beginning of January 2023. It contains a lot of information members may find interesting, including the number of names associated with the Dales. It was set up primarily for the Spensley family but as other families connect to them, it has been extended and produced information we might find interesting and useful.

With nearly 1700 family names, and nearly 100 of the individuals being Metcalfes, it could be a very useful site to look at.

Another useful site: <http://www.dalesgenealogy.com/ships.html>

One very interesting page includes the ships that transported emigrants to America in the mid-19th century from Liverpool. Presumably, it was the most convenient port for the Dales folk. The site includes an extract from the Diary of a William Broderick in 1830-33 where he describes the decision of one Dales family who planned to go to America and the preparations to do so. This would have been a massive commitment for the families – the dangers of the voyage not the least, but stepping into the unknown on the word of someone else. The preparation for the journey must have been quite exciting and traumatic at the same time. Choosing who would go – all the family or just the father or son to set things up for the rest to follow, what to take with them, what could be left behind and what they should get rid of. There must have been numerous sales going on amongst those leaving as they disposed of the furniture they couldn't take with them and hoped to recoup funds to see them through the journey and until they got work at the other end. (Memories of the sales in the various Victorian based novels by Hardy and others)

One aspect that this raises is that we cannot always find all the relevant family history data on the internet or we may be duplicating the work of others, so if you have found a web site that is really useful, please let us know so we can share it with others and help each other.

Jo Heron

Bits & Bobs

Just picked this up from
Forces War Records.
He was in the Royal Canadian Air Force.
Is he related to any of our members?
Is there a connection there, even if not a member?

First Name: **Malcolm Roy Edgar**
Surname: **Metcalfe**
Date of Death: 05/05/1943
Fate: Killed in action
Rank: Flight Sergeant
Service Number: R104383
Base: Leeming, Yorks
Trade: Air Bomber
Age On Death: 19
Fate Details: Lost Without Trace During A Raid on Dortmund
Aircraft Number: HR658
Residence Place: Glace Bay, Nova Scotia, Canada
Buried Or Commemorated: Runnymede Memorial, Surrey
Primary Unit: Royal Canadian Air Force
Secondary Unit: 408 Squadron (Why is this important?)
Archive Reference: Airmen Died in the Second World War
Command: Bomber Command
Aircraft: Halifax II.

Just looked up Malcolm Roy Edgar (64147) and he was already on our database.
His parents, **William F** (100782) and **Winnifred** (100783), but there doesn't seem to be any
further information. **Do you have any?**

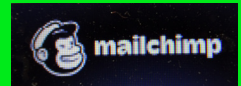
Jo Heron

and finally..... I hope you have enjoyed the read.

If you have any comments /articles you wish to pass on please get in touch.
Don't forget to renew your membership!

If you use social media please 'like us' on Facebook to keep up to date on our news and events.
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