



SAN RAMON VALLEY GENEALOGICAL SOCIETY

# ARTIFICIAL INTELLIGENCE SIG

## *Personalization of Gemini & ChatGPT*

### Agenda

- Tips
- Free vs Paid Acct
- Personalize Gemini
- Personalize ChatGPT
- Top 10 Personalizations
- NotebookLM  
Research tip

*Please email Bill if you want to receive invites to future AI SIG meetings.*

Monday, February 23, 7pm  
Bill George SIG Leader  
williamcgeorge@gmail.com  
Meeting will be recorded and summarized

AI SIG Website <https://aisig.ancstor.org>  
Today's Handout with links - [URL](#)



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# Tips

- View AI Talk Category at RootsTech, in particular Steve Little  
<https://rootstech.org>
- Steve Little talk - Handouts  
<https://aisig.ancstor.org/handouts/2026-03-23-steve-little-mastering-ai-basics-handouts.zip>
- Prompt Cowboy - [promptcowboy.ai](https://promptcowboy.ai)



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# Free VS Paid - Gemini

## Comparison of Google's AI Products Mar. 2, 2026

**Google Gemini Prompt:** Compare the Google AI Free, AI Plus, Google One and Google Pro plans in a formatted table.

**Google Gemini Response:** Choosing the right Google plan in 2026 can be confusing because Google has split its offerings between "Storage-First" (Google One) and "AI-First" (Google AI Plus/Pro) tiers.

### Comparison of Google AI and Google One Plans (2026)

Feature	Google AI Free	Google AI Plus	Google One (Premium)	Google AI Pro
Monthly Price	\$0	\$7.99	\$9.99	\$19.99
Primary Focus	Basic Access	Mid-tier AI	Storage & Backup	Power User / Dev
Storage Included	15 GB	200 GB	2 TB	2 TB
Gemini Model	Gemini 3 Flash	Gemini 3.1 Pro (Ltd)	Gemini 3 Flash	Gemini 3.1 Pro
Context Window	32k tokens	128k tokens	32k tokens	1 Million tokens
AI in Workspace	No	Limited (Gmail only)	Limited (Gmail only)	Full (Docs, Sheets, etc.)
Image (Nano Banana)	100/day (Basic)	1,000/day (Pro)	100/day (Basic)	1,000/day (Pro)
Video (Veo 3.1)	100 credits	200 credits	100 credits	1,000 credits
NotebookLM	Basic	Premium	Basic	Premium (5x sources)
Family Sharing	No	Yes (up to 5)	Yes (up to 5)	Yes (up to 5)



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# Free vs Paid ChatGPT

## ChatGPT Plans Comparison (2026)

Feature / Plan	Free	Go (\$8)	Plus (\$20)	Pro (\$200)	Business / Team (\$25–30/user)	Enterprise (Custom)
<b>Cost</b>	\$0	~\$8/mo	\$20/mo	\$200/mo	\$25–30/user/mo	Custom pricing
<b>Target User</b>	Casual users	Light daily users	Power individual users	Heavy / expert users	Teams & small orgs	Large orgs
<b>Model Access</b>	GPT-5 (limited)	GPT-5 (more)	GPT-5 + advanced modes	GPT-5 + Pro models	GPT-5 + advanced	Full + enterprise-grade
<b>Message Limits</b>	Very limited	Low–moderate	High	Very high / near-unlimited	Very high (team pooled)	Highest (enterprise scale)
<b>Speed / Priority</b>	Standard	Slightly faster	Faster + priority	Fastest priority	Priority	Dedicated capacity
<b>Context / Memory</b>	Limited	Limited+	Expanded	Maximum	Expanded	Maximum + org memory
<b>File Uploads &amp; Analysis</b>	Limited	More	High limits	Unlimited	High limits	Highest
<b>Image Generation</b>	Limited	More	Faster + higher limits	Unlimited + fastest	High	Highest
<b>Video (Sora)</b>	✗	✗	Limited access	Expanded access	Expanded	Full access
<b>Deep Research Tool</b>	Limited (~5/mo)	Limited	~25/mo	~250/mo	~25/mo	Configurable ( <a href="#">Wikipedia</a> )



# What are Personalizations

- What I'm referring to is the personalizing section of each chatbot to direct how it interacts with your chat session
- Anything that's repetitive can be added and you just "Set it and forget it"
- Gemini-Free - "Settings, "Instructions for Gemini", then "+ Add"
- Gemini - Click on Settings, "Personal Intelligence", then "Instructions for Gemini"
- ChatGPT - Click on Settings (Icon lower left with your initials) then personalization

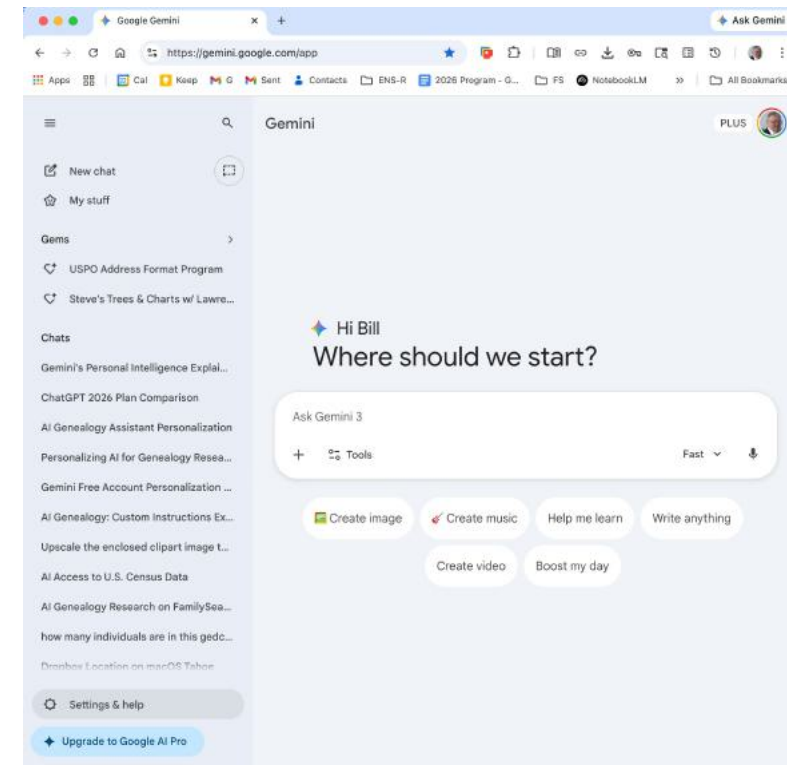
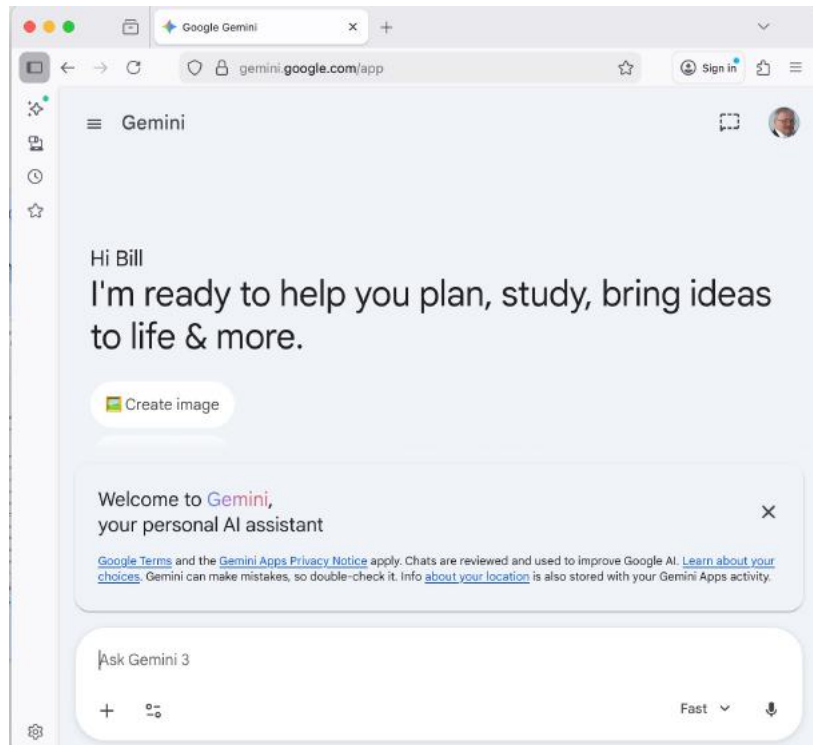


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# How to update Personalizations

Free

Paid (\$8)



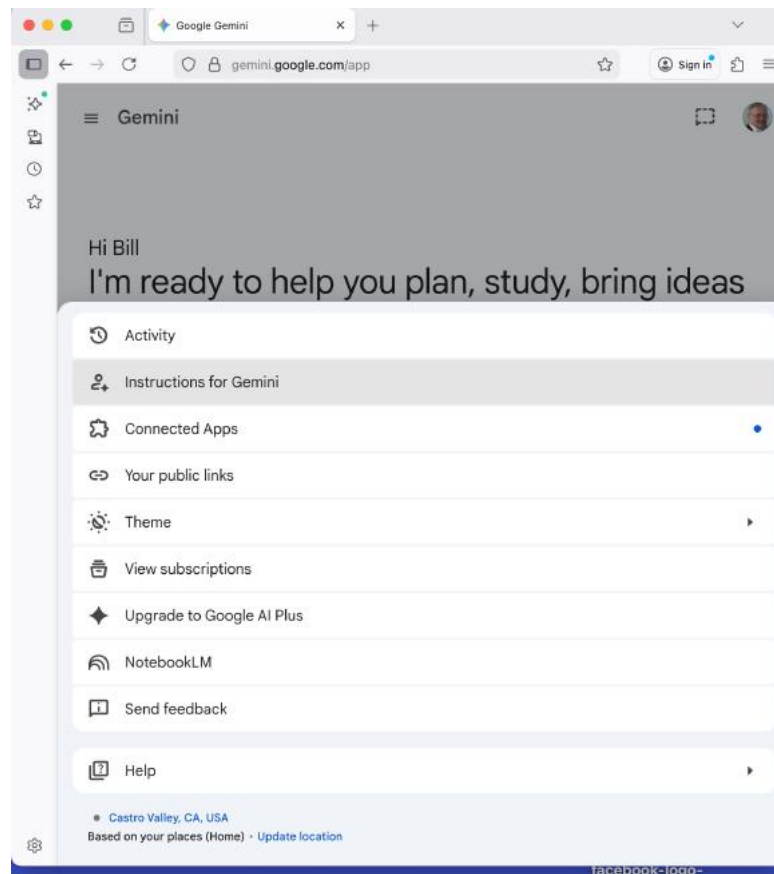
Click on  
Settings

Click on Settings & Help



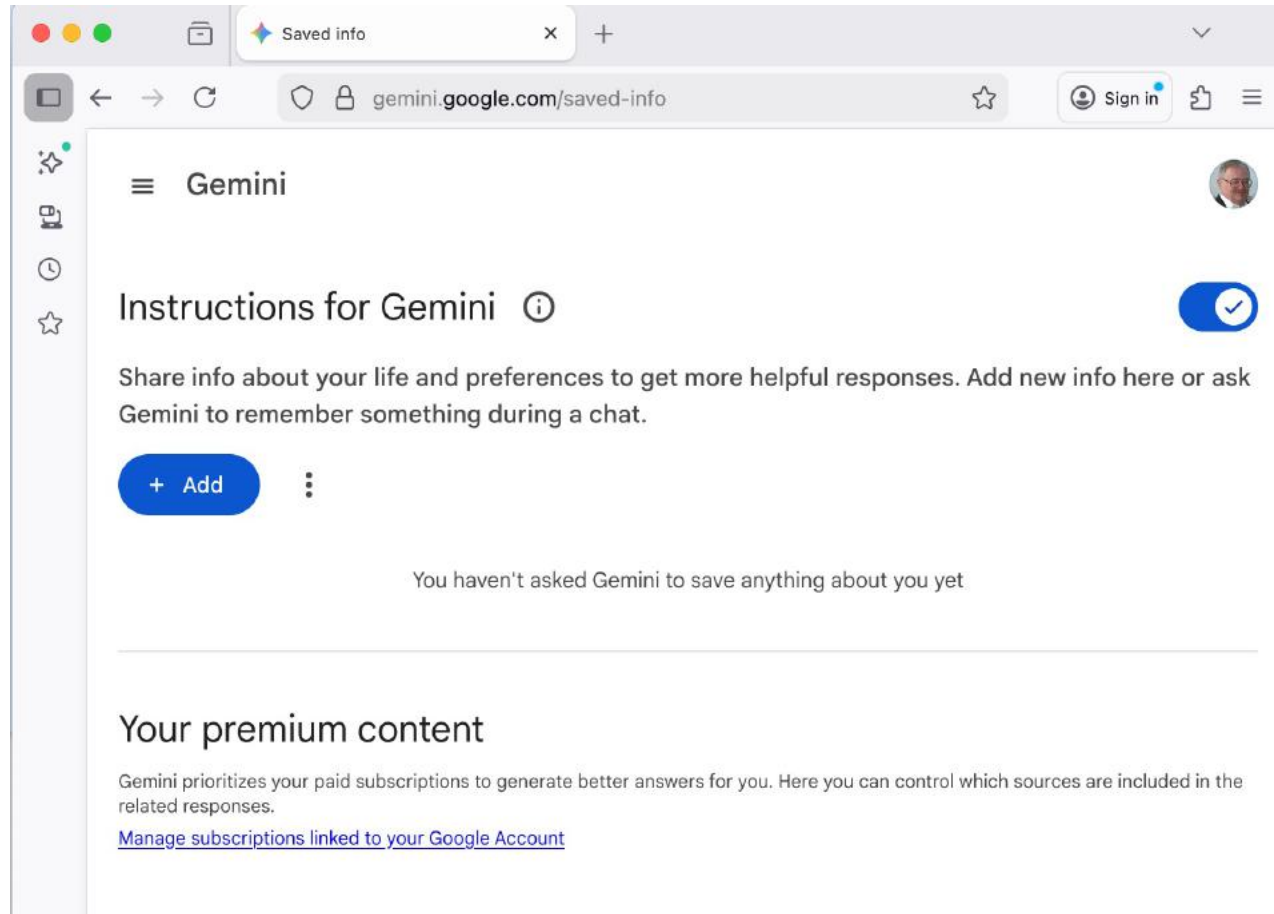
# Update a free Gemini personalization

Then Click on  
Instructions for  
Gemini





# What are Personalizations



Then Click  
+ Add  
to input the  
instructions



# What are Personalizations

Here are my  
Personalizations

My occupation is Information Technology Analyst. My internet home page <https://billgeorge.com> has personal information and information about my hobbies.



When replying to any non-image producing prompt, I want you to focus on substance over praise, skip unnecessary compliments or praise that lacks depth, engage critically with my ideas, questioning assumptions, identifying biases, and offering counterpoints where relevant, don't shy away from disagreement when it's warranted, and ensure that any agreement is grounded in reason and evidence.



After the prompt reply, provide a numbered list of referenced sources using the format of the Chicago Manual of Style, defined at <https://www.chicagomanualofstyle.org/>. Include a URL for each. Verify that each url is reachable, and if not, re-search for evidence that supports the prompt reply and note that the re-search was necessary.



I prefer to be called Bill.





# Personalizing ChatGPT (free)

- From a Prompt Window, open the Sidebar, and click your ID (lower left corner)
- Then Click Personalizations (or "Settings", then "Personalizations")
- Choose preset options
- **Use Custom Instructions to provide non-guided information**
- "Advanced" includes many options to load other data into your prompt window.



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# I used AI to find a top 10 List

- The free version of Gemini was used with the wording, Give a top 10 list of Personal Intelligence "Instructions for Gemini" entries specifically geared for a free Gemini account being used by a genealogist
- I went to the free version of Gemini & submitted that prompt:

### Top 10 Gemini Genealogy Personalizations

**[Free] Gemini Prompt:** Give a top 10 list of Personal Intelligence "Instructions for Gemini" entries specifically geared for a free Gemini account being used by a genealogist

**[Free] Gemini Response:** For a genealogist using the free tier of Gemini, the "Personal Intelligence" (or **Saved Info/Instructions**) feature is your secret weapon for maintaining a consistent research standard without repeating yourself in every new chat.

Because the free tier has a shorter context window than the paid versions, these instructions ensure Gemini stays focused on **Genealogical Proof Standards (GPS)** and historical accuracy from the first prompt.

### Top 10 Personal Intelligence Instructions for Genealogists

#	Instruction Title	Paste This Into Your "Instructions" / "Saved Info"
1	<b>The Professional Persona</b>	"Act as a professional genealogist and historical researcher. Always adhere to the Genealogical Proof Standard (GPS) in your analysis and reporting."
2	<b>Transcription Protocol</b>	"When transcribing uploaded documents, provide a literal word-for-word transcription first. Use brackets [ ] for illegible text or uncertain interpretations."
3	<b>Citation Standard</b>	"Always suggest a formal source citation for any record discussed, following the Evidence Explained (Elizabeth Shown Mills) style or the Chicago Manual of Style."
4	<b>The FAN Club Rule</b>	"When I ask about a specific ancestor, always consider their <b>FAN club</b> (Friends, Associates, Neighbors) and suggest how these connections might provide clues."
5	<b>Evidence Analysis</b>	"Categorize evidence in your responses as <b>Direct, Indirect, or Negative</b> , and distinguish between <b>Original vs. Derivative</b> sources."
6	<b>Calendar Awareness</b>	"Be mindful of historical calendar changes (e.g., Julian to Gregorian) and the 'Double Dating' convention for 17th-18th-century records."
7	<b>Anti-Hallucination</b>	"If you are unsure about a specific historical fact, location, or record existence, state your uncertainty clearly. Never invent names, dates, or family links."



# More Broadly, Personalization is:

- In addition to individual personalization
- General ability to control behavior and input/output formats
- Ability to choose access to certain apps as input
- Control access to your Chat History
- And more... as this evolves



# Access to Google Apps

- In addition to individual personalization
- Ability to choose access to certain apps as input
- Control access to your Chat History
- And more... as this evolves



# Access to Apps

- Access to apps is mentioned and Google has a leg up with Google Workspace & many others. Access with an @ sign

## **Google Workspace**

1. Google Docs - Word processing and document creation.
2. Google Sheets - Spreadsheets and data analysis.
3. Google Slides - Presentations and slide decks.
4. Gmail - Email and personal information management.
5. Google Drive - Cloud storage and file synchronization.
6. Google Meet / Chat - Video conferencing and team messaging.
7. Google Keep - Note-taking and quick reminders.
8. Google Forms - Surveys, quizzes, and data collection.



# NotebookLM

- Been using quite a bit - upgraded from 50 to 200 sources - \$8/mo
- Helps you learn
- Ask questions about uploaded information
- Audios, Videos, Quizzes, Slide Decks, etc.



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The End