



Thank you for your interest in working with Utah Open Lands (UOL) on a conservation project. The project appears to have merit and you should be commended for your effort to save Utah's beautiful country. We appreciate that you have chosen us to help you with this endeavor. However, to fully understand the project, UOL needs to evaluate both the property and the project itself.

For Utah Open Lands to make an informed decision about your property and the project, we will need to make a site visit. During this site visit and throughout our process, we will discuss the project with you to ascertain your goals. After you have received this letter, please call me so we can set an appointment for this initial site visit.

Before this site visit occurs, it is critical that we gather some preliminary information about the property. We have enclosed our Landowner Guide which aside from relevant information regarding Utah Open Lands and the necessary process for conservation is a **worksheet you will need to complete and return.**

It is critical that we obtain this information before the site visit so that we can begin to understand the project.

Once we have received the above information and completed the site visit, UOL staff and board will review the project in order to determine if the project is one that we can undertake.

Please note that regardless of whether Utah Open Lands accepts the project, there are costs associated with any conservation project. These costs include expenses that a landowner incurs in obtaining necessary title information and appraisal work as well as costs Utah Open Lands must cover in order to insure our capacity to safeguard your project. These costs include the baseline documentation required for the conservation easement, the easement drafting and staff time reviewing and engaging the project and a stewardship cost associated with all conservation easement transactions.

Also, please be aware that if you wish the donation of the conservation easement to be tax deductible, the terms of the easement must comply with §170(h) of the Internal Revenue Code. You will need to retain an appraiser who has experience in appraising conservation easements. Any gift over \$5,000.00 requires the submittal of an 8283 form. This form requires an appraisal that meets the requirement set forth under 170(h) of the IRS code. Utah Open Lands refers you to Internal Revenue Service Bulletin 2006-96 for further information. In general, you should be aware of the timing of the appraisal; the appraisal cannot be done more than 60 days prior to the date the gift is made; you should use an appraiser who follows Uniform Standards of Professional Appraisal Practice. Also be aware that you, as the donor, not the land trust, are responsible for any determination of the value of the donation. We inform all landowners that the land trust will not knowingly participate in a project where it has significant concerns about the tax deduction. Be sure to find out from your chosen appraiser whether he/she is qualified to appraise conservation easements.

Utah Open Lands is not qualified to give tax, estate planning, real estate, or accounting advice to assist you in evaluating these benefits, and we strongly encourage you to seek outside professional advice.

We feel that it is not only important for us to make sure that we are the right organization for your needs, but for you to do so as well. The Landowner Guide includes some information about us, our mission and goals, as well as information concerning some of the projects that we have completed. If there are any questions about Utah Open Lands or anything else, please feel free to call me at (801)463-6156.

Sincerely yours,

Wendy E. Fisher  
Executive Director

## Conservation Worksheet

The following information is relevant to completing the transaction. Please answer all. Completion of this form does not constitute Utah Open Lands' board approval and or acceptance of any interest in the delineated property. Any questions on this form or other matters, should be directed to 801.463.6156 or Wendy@UtahOpenLands.org

Landowner Name:
How is the property held?
If the property is owned through a trust, partnership or corporation please specify who will be making the grant of easement or property?
Address:
Stipulate address to be used in the documentation:
Contact Person(s):
Email:
Location of Property:
Acreage:
Current Use:

**You are asking Utah Open Lands to:** (Check one of the following)

- Accept a Donation       Provide funds to acquire  
 Accept a Partial donation and provide remaining funds to acquire  
 Accept land in conjunction with a Regulatory or zoning condition.

If Regulatory or zoning condition, is this parcel of land part of a development plan that may cause a quid quo pro?

**Of:** (check one of the following)       Fee Title       Conservation Easement

Documents you could provide to UOL for Baseline Documentation work (check the following)

- Aerial map    Topo map    Plat map    Wildlife studies    Survey    Legal description

Time Frame for preservation:
Has the property been appraised?      When:
Was the appraisal for a conservation easement or fee title?
When was the most recent title report issued?
Are there title issues you are aware of which would prevent a grant of conservation easement?
Are there liens or mortgages on the property and if so can they be made subordinate to the easement?
Of the existing easements on the property are there rights of way/easements that should be vacated prior to the grant of easement?

Conservation Worksheet *continued*

How long have you owned the property?

Are the Mineral interests severed from the property?

Are there trails currently on this property open to the public?

Will this property be publicly accessible?

Are there trails, trailheads, or public viewing areas contemplated for this property?

What is the proximity of this property to other protected lands (county, state, federal, non governmental)?

What is the proximity of this property to development or planned development?

Is this open space being dedicated as part of a planned development or through a regulatory process requiring that a certain amount of acreage be set aside?

Are you willing to contribute to Utah Open Lands Stewardship Fund, specifically for this property?

Have you contacted any other organizations about the preservation of your land? If "yes", which ones:

Are you currently working with any organization to preserve your land; or has any other organization been asked to consider your project? If "yes", please explain:

By initialing here you are giving Utah Open Lands authorization to represent to our funding partners your land preservation as a Utah Open Lands Project.

Are you aware of any toxic or hazardous materials on the property?  Yes  No  I am not sure

Continued Uses and Reserved Rights on the Property

- Grazing # of livestock \_\_\_\_\_
- House / Cabin Site(s) \_\_\_\_\_
- Hunting / Fishing \_\_\_\_\_
- Public Access \_\_\_\_\_
- Family Use \_\_\_\_\_
- Motorized vehicle needs \_\_\_\_\_
- Farming Ranching Activities \_\_\_\_\_
- Timber harvesting for personal use \_\_\_\_\_
- Resource improvement/restoration \_\_\_\_\_
- Future uses \_\_\_\_\_
- Commercial Use \_\_\_\_\_
- Industrial Uses \_\_\_\_\_
- Outbuildings \_\_\_\_\_
- Relocation, renovation of existing structures \_\_\_\_\_
- Fencing \_\_\_\_\_
- Other \_\_\_\_\_

Utah Open Lands Internal Use

Date of Contact: \_\_\_\_\_

Initial Contact: \_\_\_\_\_

Three day waiver letter of intent: \_\_\_\_\_

Landowner packet sent: \_\_\_\_\_

Conservation Purposes \_\_\_\_\_

- Wildlife  Agricultural
- Scenic  Historic  Recreation

Site Visit: \_\_\_\_\_

Time Frame for Completion: \_\_\_\_\_

Conservation Easement Draft \_\_\_\_\_

Attorney assigned: \_\_\_\_\_

Board of Trustee Approval: \_\_\_\_\_

Date: \_\_\_\_\_

Title Insurance: \_\_\_\_\_

8283 Form Disclosure: \_\_\_\_\_

Mineral Interest/Geologist Report: \_\_\_\_\_

Baseline Report status: \_\_\_\_\_

Appraiser: \_\_\_\_\_

Landowner attorney: \_\_\_\_\_

If regular mailing please sign: \_\_\_\_\_

or

Email by clicking email icon

