

BenchMark Advisors

Planning and Conservation Strategy

Survey/Mapping

PHASE 1

- Assimilate Data Available from local municipalities or from public domain sources.

PHASE 4

- Survey final easement boundary for plat purposes

Land Planning

PHASE 1

Land Resource Analysis

- Topography
- Vegetation
- Hydrology
- Geology and Soils
- Ecological And Wildlife
- Adjacent land uses
- Other

PHASE 2

- Yield/As-of-Right Plans
- Conservation Plans

PHASE 3

- Final Exhibits for Land Resource Analysis

PHASE 4

- Compile Final Report for Appraisal Back-Up

Appraiser

PHASE 1

Preliminary Analysis

- Research
- Preliminary Valuation

PHASE 4

Final Appraisal

- Before Easement
- After Easement

Final Appraisal Must be done within 30 days of Easement being placed.

Land Trust

Review Local, Regional and National Land Trusts for Most Viable Trust to Accept Easement.

- Site Visits with 2-3 Candidates.
- Determine Best Alternative.
- Review "Model" Easement.
- Select Land Trust
- Negotiate Terms of Easement.
- Monitoring Strategy

Legal

Select Legal Counsel with Knowledge and Experience with IRS Code Requirements.

- Ownership Requirements
- Beneficiaries

Accountant

Owners Accountant to Review and Advise on Owners Tax Status and Eligibility. Knowledge and Experience with IRS Code Requirements.

- Charitable Contributions
- Adjusted Gross Income
- Carry Forward Eligibility

Engineering

Review of Planning Documents and Providing Cost Data as may be Required by Appraiser

Review Appraiser

Not a Second Appraisal This is a "Desk Review" of Appraisal for Compliance

Easement Legal

Possible Legal Costs by Land Trust Counsel to Draft Easement Document

Endowment

Endowment May Be Required To Fund Ongoing Monitoring

Organization Chart

For Placement of a Conservation Easement