

Conservation Easement – Landowner Questionnaire

To aid the landowner in tailoring conservation easements to land protection and financial planning goals.

Landowner Name: _____
Property Name: _____
Property Acreage: _____
Date: _____

A. Your Goals as Landowner (Check all that apply in each question.)

- (1) Which values are important to you about your property?
 - _____ place to live
 - _____ place to visit
 - _____ financial asset
 - _____ pass on to the children
 - _____ preserve natural landscape and setting
 - _____ other: _____

- (2) How are you likely to use your property in the next 20 years?
 - _____ leave as is
 - _____ build house(s)
 - _____ sell
 - _____ give to children
 - _____ other: _____

- (3) Why are you considering a conservation easement?
 - _____ to keep land open
 - _____ tax deduction
 - _____ estate planning
 - _____ to protect special land feature or wildlife
 - _____ avoid family conflicts about future uses
 - _____ other: _____

- (4) Which actions are consistent with your goals for the property?
 - _____ create opportunities to enhance existing wildlife, scenic and/or agricultural resources as one of the primary uses of the property
 - _____ create strong conservation restrictions so existing wildlife, scenic and/or agricultural resources are maintained and not diminished
 - _____ protect existing resources but allow room for some development for children or others
 - _____ create restrictions to generally protect resources and get tax deduction

- (5) Are you uncertain about how you would like to use your property in the future?
 - _____ yes
 - _____ no

Comments:

B. Property Description and Conservation Values

(1) What is the acreage of your property? _____

(2) How many legal parcels does it consist of? _____

(3) What is the size of each parcel? _____

(4) Which qualities of the property are important to you in protecting?

(5) What special features of the property are important to you to protect?

____ homesteading and family history	____ topographical or geological
____ wildlife observations and resources	____ water frontage, ponds, etc.
____ forestry or agricultural use	____ other: _____

(6) Are there any benefits of adjoining lands that are especially important to you (i.e., protected open space, scenic vistas, special land feature, etc.)? If so, please describe.

(7) Are there any uses or plans for adjacent lands that especially concern you (i.e., subdivision, condominium development, heavy commercial use, fences blocking wildlife migration, etc.)? If so, please describe.

C. Property Ownership and Land Division (Mostly yes/no responses)

(1) Is the property owned jointly with family members ____ or non-family partners ____?

(2) How many years have you or your family owned the property? _____

(3) Has the owner of record changed during that time period (i.e. from a couple to an individual, partnership or trust)? _____

(4) Do you contemplate changing ownership in the future? _____
If yes, why and in what way?

(5) Is your property divided (i.e. multiple lots, subdivisions, etc.)? _____
If yes, briefly describe. _____

(6) Do you contemplate dividing your property? _____

(7) Is your property encumbered with any of the following?

_____ covenants	_____ utility easements
_____ deed restrictions	_____ easement of sight or record
_____ mortgage	_____ current use
_____ road easements	_____ other: _____

(8) Is the property that you are interested in protecting part of a larger adjacent property holding?
_____ yes _____ no

(9) Do you own other land elsewhere?
_____ yes _____ no

D. Current and Future Use of Property

(1) Do you now, or plan in the future, to use your property for any of the following?

_____ agriculture	_____ commercial or industrial use
_____ home-occupancy business	_____ long-term leasing

(2) Do you now, or plan in the future, to manipulate your property in any of the following ways?

_____ wetland enhancement/ pond creation	_____ fishery or wildlife habitat enhancement
_____ watercourse channeling	_____ tree or vegetation clearing
_____ topographical grading	_____ mining or gravel excavation
_____ road building	_____ creating land pad or airstrip
_____ trail building	_____ till for cultivation

(3) Do you now, or plan in the future, to use your property for any of the following recreational activities?

____ walking

____ horseback riding

____ skiing

____ photography

____ snowmobiling

____ large group tours

____ fishing

____ hunting

____ commercial recreation

E. Buildings

(1) Briefly list the number of each type of existing buildings.

Principle residences: ____

Guest houses: ____

Non-residential buildings (i.e., detached garages and barns): ____

Agricultural buildings: ____

(2) Briefly describe your future building plans (if any):
