

The following steps are typical when we work with landowners to conserve their property. However, this is only a guideline; each situation is unique. We can work with you to customize the process as needed. Please be aware that the timeline for this process is variable; depending on your goals, funding, and our capacity, conserving a single property start to finish can take between 6 months to 2 years to complete, and sometimes longer.

- **Identify your short- and long-term goals:** property, financial, personal and/or conservation. Discuss these and the concept of conservation with family members and partners as needed to obtain their input.
- **Contact Stowe Land Trust** to let us know you are interested in conserving your land or learning more about what's involved. We'll respond and let you know if it makes sense to set up a call or meeting.
- **Meet with Stowe Land Trust staff** to discuss: the history of your land and who owns it; your goals for the land and motivations for conservation; and your conservation options. We may take a walk on your land or meet at our office or in your home. If both parties decide to move ahead, our staff will gather additional information and bring the project to our Lands Committee for initial review. If we decide that permanent conservation of your land with Stowe Land Trust isn't the right fit, we'll review other options with you.
- **Discuss the idea of conserving your land with your attorney, tax advisor or other trusted advisor** who is experienced in land conservation and easements. They can identify the likely financial and estate planning impacts of conserving your land. If needed, we can share an example conservation easement for you and your attorney to review.

If we determine that conserving your land with Stowe Land Trust is right for you and us:

- **Review a proposal prepared by our staff.** Each property and situation are different, but a proposal will generally outline: the conservation values of your land, our understanding our shared goals, the proposed option for conservation (e.g. donation or bargain sale of a conservation easement or a bargain sale of land), any important parameters or issues to discuss, costs and how they will be covered (e.g. stewardship endowment and legal fees), and next steps (e.g. applying for funding or obtaining an appraisal).

If you are donating a conservation easement, you may also be asked to donate funds to cover legal costs and/or a stewardship endowment to ensure that Stowe Land Trust has the resources to ensure your land is cared for in perpetuity.

- **Finalize the proposal and move forward with next steps.** If there are items in the initial proposal that you don't understand or agree with, contact us to discuss. We'll work with you to clarify and, if possible, find mutually agreeable solutions. At this point, we may proceed with some preliminary steps of obtaining an appraisal, applying for public funding, talking with our partners, and/or doing some additional project planning. Or we may go straight to the next step of obtaining approval to proceed.
- **Wait to receive Stowe Land Trust pre-approval.** For every potential conservation project, our Lands Committee completes a full review and makes a recommendation to our Board of Directors to proceed. If approved, we can proceed with working together to conserve your land!
- **Proceed with next steps.** These may include preparing and signing a contract for the sale of your land or development rights, obtaining an appraisal, applying for funding and/or beginning due diligence - and fundraising, if necessary.
- **Share information about your property with Stowe Land Trust.** This may include surveys, deeds, title insurance, mortgage information and your current forest management plan.
- **Review the easement and other project documents** our staff prepares. Your legal counsel will be able to assist. These may include deeds, a conservation easement, a baseline documentation report, an environmental assessment.
- **Disclose any potential hazardous waste sites** such as old dumps, mining areas, storage tanks and other potential sources of pollutants on the property and to remediate these if necessary. If the property has a mortgage, you will be asked to obtain a mortgage subordination from the lender.
- **Meet with your legal counsel** and Stowe Land Trust staff to review all the documentation and finalize the easement terms. Set a closing either at the land trust or a participating lawyer's office.
- **Sign and record the conservation easement** and/or deeds and any associated documents at the closing. If you are receiving full or partial payment for your land or a conservation easement, you will receive that at the closing. If you owe Stowe Land Trust any payments for legal fees or a stewardship endowment, that will also typically be paid at closing.

- **Celebrate!** Congratulations! Your land is now conserved! If possible, we'll want to take a picture at the closing and share the good news of the conservation of your land with our community. Thank you - you did it!

Once your property has been conserved, if you still own the land, be prepared to:

- **Enjoy the good feeling** of having created a lasting legacy of conserving your land for future generations. Well done.
- **Allow Stowe Land Trust stewardship staff to visit and inspect your property** if you have retained ownership of the land as part of an annual easement monitoring visit. Before the first visit, our staff will send you a welcome packet with information about our Stewardship Program. Around the time of each visit, they will also contact you to touch base.
- **Contact us if you have any questions or are considering doing any activities that require our approval.** We are always glad to hear from you!