



Transaction Intake Form

for SAHC to initiate evaluation of a proposed conservation transaction

1. Name of person filling out this form: _____

2. Date form completed: _____

3. Who owns the land?

Individual person Name of person _____

Joint ownership by more than one person Names of persons with any ownership interest:

Estate of a deceased person Name of Deceased _____

Names of beneficiaries or claimants who may have an interest in the land _____

Corporation. Name of corporation: _____

Partnership. Name of partnership: _____

LLC Name of LLC: _____

Trust. Name of trust: _____

4. If owned by a corporation, partnership, LLC or other joint entity, who are the principal decision-makers?

5. Name(s) of landowner(s) as it appears on deed: _____

6. Landowner mailing address(es): _____

7. Phone & E-mail addresses: _____

8. Property name or description: _____

9. County/Counties in which property is located: _____

10. County Property Identification Number(s) (PIN): _____

11. Book/page of recorded property deed(s): _____

12. Acreage of the property: _____

13. Property address: _____

14. Which of the following types of transactions are you considering for the property?

Conservation easement This is an agreement between the landowner and SAHC, in which the landowner gives up certain development rights, but continues to own and use the land.

A landowner may wish to fully donate a conservation easement, which might make the landowner eligible for a tax benefit. In some cases, SAHC may be able to raise funds to pay a landowner for a portion of the value of the conservation easement.

Can you consider a full donation of the conservation easement? Yes No

Are you considering partial donation of value of the conservation easement? Yes No

Sale of the property to SAHC. In this scenario, SAHC buys the property and becomes its new owner.

A landowner may wish to sell the property to SAHC for less than its appraised fair market value, which can make it easier for SAHC to buy the property and potentially creates a tax benefit for the landowner.

Can you consider a sale of the property to SAHC for less than its appraised fair market value?

Yes No

Donation or bequest of the property to SAHC. A landowner may wish to donate the property to SAHC during their lifetime, or make a gift of the property in their will. This can create a potential tax benefit for the owner.

Transfer the property to SAHC, subject to retained life estate. A landowner may wish to sell or donate the property to SAHC and retain the right to continue to live there and use the property for the rest of their life.

Other type of transaction not listed above. Please describe what you are interested in pursuing with us:

15. What qualities of the property make it a good candidate to be permanently conserved?

16. Does the property adjoin land that is already conserved?

Yes No

If yes, please describe: _____

17. What are your current uses of the property? (Please include number and approx.. size of structures):

18. What future uses of the property do you wish to reserve if you place a conservation easement on the property? (include number and size of structures):

19. Is your property in a deferred property tax program?

Yes No

If yes, what land-use category is the deferred tax rate based on? _____

20. Is there a boundary survey for the property?

Yes No

21. Legal Access. Does the property adjoin a state-maintained road?

Yes No

If no, is there a recorded Right-of-way agreement for the property?

Yes No

Please identify the County, Book and Page for the Right-of-way _____

22. Does the title to the property include the mineral rights? Yes No
23. Is there a mortgage, deed of trust, or home equity loan lien on the property? Yes No
24. Is the property encumbered with any of the following? (check where appropriate)
- | | |
|--|---|
| <input type="checkbox"/> covenants | <input type="checkbox"/> utility easements |
| <input type="checkbox"/> deed restrictions | <input type="checkbox"/> easements of sight or record |
| <input type="checkbox"/> road easements | <input type="checkbox"/> other: _____ |
25. Please describe any time limitation you have to complete a transaction, or other information SAHC's staff should be aware of: _____

Please return this form to Hanna Peterman, Land Protection Associate: peterman@appalachian.org

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