



PRESERVATION TRUST FUND EASEMENT ASSISTANCE COST-SHARE APPLICATION

Preservation Trust Fund – Easement Assistance is a reimbursement program. Landowners are responsible for all costs of due diligence (title work, legal services, appraisal, etc.). Reimbursement is issued to a landowner once an easement records.

General Information

Each owner, entity (Trust, LLC, Partnership, etc.), and entity member(s) must submit tax forms and provide contact information on page 3.

Main contact for property: _____

Locality: _____ Number of Acres: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____ Phone: _____

County Tax Information (List all parcels to be included in easement. Find on tax bills or contact locality to obtain and confirm this information.)			
Tax Map # or PIN	Acres	Tax Map # or PIN	Acres

Address for Parcel if different from mailing: _____

City: _____ State: _____ Zip Code: _____

Name of Trust, LLC, or other entity, if applicable: _____

Please submit entity tax forms and provide member contact information on page 3.

Is the property a family-owned or family operated farm or forest? ☐ Yes ☐ No

List crops, livestock, and/or farm or forest products produced, and list acreage devoted to each.

Describe family's involvement in farm or forestland operation (family employment full/part-time, etc.).

Length of family ownership _____

Reimbursement Rates

Landowner Annual Income	Reimbursement Rate	Eligible Due Diligence	Easement Assistance Limit*
Up to \$95,000	100%	All	\$20,000
\$96,000 - \$110,000	75%	All	\$15,000
\$111,000-\$125,000	50%	All	\$10,000
\$125,000-\$200,000	Up to 50%	Survey Work**	\$10,000
Over \$200,000	Not Eligible	N/A	Not Eligible

Exceptions may be granted for extenuating circumstances.

**If determined by VOF staff to be necessary for the protection and stewardship of the conservation project.

While every easement and easement process may be different, there are some standard items that are necessary to have completed in order to put a property under easement with the Virginia Outdoors Foundation. This list contains some of the most common items and their associated cost. As every situation may vary, there may be additional items and costs to be considered. Use this list as a guide.

Examples of Estimated Easement Expenses

- Appraisal: \$4,500-\$6,500
- Legal Services Including Title Work: \$2,000-\$5,000
- Survey*: VOF will determine the need for a survey
- Lender's Easement & Mortgage Review: \$2,500
- VOF Baseline Documentation Report (BDR) Fee: \$3,000-\$3,500
- Other Associated Costs Such as Perc Test, Tax Advice \$_____

*Include the cost of survey if it is known that one is needed. If VOF determines that a survey is needed, the award amount may be adjusted.

Estimated Expenses:

Estimate your total costs in the space provided below including all due diligence items associated with placing your property under easement. Discuss the price of the BDR preparation fee with your VOF easement staff person. Please note that if VOF determines that a survey is necessary, this expense will be included in the grant award. You may ask for additional funds if you provide written estimates.

Estimate expenses in the space provided below.

- Appraisal: \$_____
 - Legal Services Including Title Work: \$_____
 - Survey: \$_____
 - VOF BDR Fee (\$3,000-\$3,500) \$_____
 - Other (may not be eligible): _____ \$_____
 - Other (may not be eligible): _____ \$_____
- TOTAL REQUEST: \$_____

Financial Need Information

Please use the space below or attach a separate note to describe any financial need factors that may not be revealed by the federal tax forms submitted. This could include changes in income or expenses or reasons why the easement may be more costly such as large acreages or a complicated legal description.

Additional Landowner Information

Please provide contact information for all owners*. If the land is owned by an entity (Trust, LLC, Partnership, etc.), include every member of the entity below. Indicate the percentage of ownership per entity member.

*Married couples who file a joint tax return are considered one owner. Married couples who file separate tax returns are considered separate owners.

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____ Phone: _____

Ownership Percentage: _____

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____ Phone: _____

Ownership Percentage: _____

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____ Phone: _____

Ownership Percentage: _____

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Email: _____ Phone: _____

Ownership Percentage: _____

Required Documentation

Return the completed application to the Virginia Outdoors Foundation by email to your VOF easement staff person or by mail to: Virginia Outdoors Foundation, 900 South Main Street, Blacksburg, VA 24060

Completed application

Return the following documents to the Virginia Outdoors Foundation through the use of this secure link:

<https://vof.app.box.com/f/ba12a9bc675f4f3bb25c62466d9fe633> or by mail to the address above.

Do not send tax material by email.

Copies of IRS tax returns (pages 1 and 2 for the most recent two years available for each owner/entity and for each entity member if applicable)

Completed Commonwealth of Virginia W9 Tax Form

Non-Filer Affidavit, if applicable

Preferred method for receiving grant-related documents:

Email

Physical Mail

Landowner Signature: _____ Date: _____

Survey Requirements

- Documentation of determination: (box link, email excerpt)

- *****

Approval Date: _____ Amount Approved: _____

Approved By: _____ Signature: _____

Expiration Date: _____