

Landowner Name: _____ Easement ID # _____

Work Order # _____ Application ID # _____

SWCD CHECKLIST Conservation Easement Acquisition Part I

Application Package:

- | | |
|------------------------------------|---|
| ____ Application | ____ Copy of Current Deed(s) |
| ____ Aerial Photo(s)/Map(s) | ____ Trust or Partnership Documents* |
| ____ GIS Shapefile | ____ LLC Documents/Meeting Minutes* |
| ____ Easement Area Assessment Form | ____ Agreement Information Form (AIF) |
| ____ CEFW | ____ W-9 for Easement Payee (not co-payees) |
| ____ Parcel Report(s)* | ____ Scoresheet* |

**submit when applicable*

Application Stage

- 1) Date _____ Local prioritization completed
- 2) Date _____ Application Package completed
- 3) Date _____ Upload or mail entire Application Package to BWSR for review and funding approval
- 4) Date _____ BWSR notification of funding status
 Approved by BWSR for funding _____ Not approved by BWSR for funding _____
 If the application is not funded, stop here. Date landowner notified of the action: _____

Agreement Stage

- 4) Date _____ Revised shapefile received from BWSR (if applicable)
- 5) Date _____ Landowner approval of new acreage, boundary, and payment (if applicable)
- 6) Date _____ Revised application documents submitted to BWSR (if applicable)
- 7) Date _____ BWSR offer approval letter delivered to FSA office (CREP only)
- 8) Date _____ Cultural Resources – MN-CPA-048/NRCS-CPA-52 (CREP only)
 MN-CPA-048 uploaded to SharePoint _____ MN-CPA-048 to SHPO/THPO _____
 MN-CPA-048 & NRCS-CPA-52 to FSA _____ SHPO/THPO response _____
- 9) Date _____ CRP CPO completed (CREP only)
- 10) Date _____ CRP-1 approved and uploaded (CREP only). CRP contract number: _____
- 11) Date _____ Agreement documents received from BWSR
- 12) Date _____ Review for correct grantor names (e.g., spelling), payment terms and amounts, etc. Date landowner contacted for signature: _____
- 13) Date _____ Obtain notarized signatures of grantors
- 14) Date _____ Signed agreement documents sent to BWSR, via certified mail
- 15) Date _____ One fully executed agreement document received from BWSR (via email)

Note: BWSR also sends one fully executed agreement document directly to landowner with letter reminding them to check with SWCD regarding the need for an updated property abstract. SWCD must ask title agent if needed (varies by county).

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SWCD CHECKLIST
Conservation Easement Acquisition
Part II

Conservation Plan Package:

- ____ Conservation Plan Workbook (complete all tabs)
 ____ Conservation Plan Map

Title Commitment Package:

- ____ Title Insurance Commitment
 ____ Copies of Recorded Exception Docs (Review B-II)
 ____ Copy of Signed Mortgage Subordination (if applicable)

Easement Stage

- 16) Date _____ Received updated property abstract from the landowner (if applicable)
- 17) Date _____ Requested title insurance commitment from title insurance agent
- 18) Date _____ Received title insurance commitment (should be within 14 days of request)
- 19) Date _____ Obtained copies of recorded documents listed as Schedule B exceptions and signed subordination and consent forms, when applicable
- 20) Date _____ Prepared conservation plan package (do not have landowner sign yet)
- 21) Date _____ Title commitment package and conservation plan package sent to bwsr.rim@state.mn.us in one email (components listed on top of page)
Note: Do not send originals of signed mortgage subordination documents
- 22) Date _____ Received easement with attached legal description and exhibit(s) from BWSR. Date landowner contacted for signature: _____
- 23) Date _____ All notarized landowner signature(s) obtained on easement document and the following completed:
 ____ Conservation Plan information, including construction and planting/seeding plans, reviewed with the landowner(s) and the principal landowner signed the plan (should be the same date as the signature of the easement).
 ____ IRS 1099S Information Forms completed and signed by the landowners (when applicable).
 ____ Verified that any environmental problems have been resolved.
- 24) Date _____ Easement, attachments, and exhibits recorded by title agent and final title policy requested
Note: Title agent must complete a courthouse search (gap check) for recent transactions, prior to recording easement document.
- 25) Date _____ Recorded easement and final title insurance policy received
- 26) Date _____ Sent by certified mail to BWSR (see instructions from letter):
 ____ Original, recorded easement document
 ____ Original title insurance policy
 ____ Copy of signed conservation plan (all pages)
 ____ Original, recorded mortgage subordination (if applicable)
 ____ Original, recorded NoFR (if applicable)
 ____ Completed and signed 1099s Information Forms (if applicable)
- 27) Date _____ Sent landowner a copy of the recorded easement
- 28) Date _____ Notification of Easement payment received from BWSR
- 29) Date _____ Reimbursement Requested (title costs, recording fees, work orders, etc.)
- 30) Date _____ Easement boundary posted