

Landowner Name: \_\_\_\_\_

Easement ID # \_\_\_\_\_

## SWCD CHECKLIST Conservation Easement Acquisition *Part I*

**FOR CONTINUOUS, NONCOMPETITIVE SIGN-UPS, SUBMIT ALL ITEMS LISTED IN BOTH THE “APPLICATION PACKAGE” BOX AND THE “AGREEMENT PACKAGE” BOX. SUBMIT AS ONE PACKAGE TO BWSR.**

Application Package		
____ Application	____ CEFW	____ Wetland Restoration Info form*
____ Aerial Photos	____ CEPPW	____ W-9 Federal Tax ID Certification
____ Easement Area Assessment		____ Land Use & Soils*
		*submit when applicable

### Application Stage

- 1) Date \_\_\_\_\_ **Application package completed**
- 2) Date \_\_\_\_\_ **Local prioritization completed**  
 Screening Committee action (optional) \_\_\_\_\_ SWCD Board Action \_\_\_\_\_  
 Approved by SWCD Board \_\_\_\_\_ Not approved by SWCD Board \_\_\_\_\_  
 If the SWCD Board does not approve the application, stop here. Owner notified of the action on \_\_\_\_\_  
(date)
- 3) Date \_\_\_\_\_ **Mail 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. Owner notified of the action on \_\_\_\_\_  
(date)

**IF APPLICATION APPROVED, PROCEED TO AGREEMENT STAGE BELOW.**

Agreement Package	
____ Agreement Information Form	
____ Copy of the Deed	____ Other documents as specifically requested
____ Copy of Government Lot Maps*	*submit when applicable

### Agreement Stage

- 5) Date \_\_\_\_\_ **Agreement Package completed (contains all components listed above)**
- 6) Date \_\_\_\_\_ **Mailed Agreement Package and other pertinent documents to BWSR.**
- 7) Date \_\_\_\_\_ **Agreement documents received from the BWSR central office.**
- 8) Date \_\_\_\_\_ **Review for correct grantor names (e.g. spelling), payment terms and amounts, etc.**
- 9) Date \_\_\_\_\_ **Obtain notarized signatures of grantors**
- 10) Date \_\_\_\_\_ **Signed agreement documents sent to BWSR central office, via certified mail**
- 11) Date \_\_\_\_\_ **One fully executed agreement document received from BWSR central office.**

(One fully executed agreement document sent directly to landowner by BWSR central office with letter reminding landowner to update their abstract.)

**Go to SWCD CHECKLIST, Conservation Easement Acquisition, Part II  
Notes**

# SWCD CHECKLIST

## Conservation Easement Acquisition

### *Part II*

**Conservation Plan Package**

<input type="checkbox"/> CEPPW (original or amended) <input type="checkbox"/> Conservation Plan (unsigned)	<input type="checkbox"/> Conservation Practice Plan <input type="checkbox"/> Conservation Plan map
---	---

**Easement Stage**

- |                |  |
|----------------|--|
| 12) Date _____ | <b>Received updated abstract from the landowner</b>  |
| 13) Date _____ | <b>Requested title insurance commitment from title insurance agent</b>   |
| 14) Date _____ | <b>Received title insurance commitment</b> (Should be within 14 days of request.)  |
| 15) Date _____ | <b>Obtain copies of consents, subordinations and other related documents pertaining to exceptions listed in the title insurance commitment, Schedule B.</b>  |
| 16) Date _____ | <b>Conservation Plan package completed (contains all components listed above)</b>  |
| 17) Date _____ | <b>Title insurance commitment, copies of related documents, and conservation plan package (unsigned) sent to BWSR</b>  |
|                | <i>Note:</i> If lender has requested to be listed as a co-payee, and they are not listed as such on the conservation agreement, request written permission from the landowner to add the lender as a co-payee, and forward it to the BWSR. <b>Do not</b> send originals of consents or other related documents.  |
| 18) Date _____ | <b>Received easement and referenced attachments and exhibits from BWSR central office.</b>   |
| 19) Date _____ | <b>All notarized landowner(s) signatures obtained on easement document and the following completed:</b>  |
|                | <input type="checkbox"/> 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).<br><input type="checkbox"/> IRS Payment Distribution Form for Multiple Grantors completed and signed by the landowner(s).<br><input type="checkbox"/> Verified that any environmental problems have been resolved. |
| 20) Date _____ | <b>Easement, attachments and exhibits recorded and final title policy requested.</b> (Courthouse search for recent transactions must be done by SWCD or title insurance agent prior to recording.)   |
| 21) Date _____ | <b>Recorded easement and final title insurance policy received.</b>  |
| 22) Date _____ | <b>Sent by certified mail to BWSR:</b>   |
|                | <input type="checkbox"/> Easement documents (with recording information shown)<br><input type="checkbox"/> Final title policy<br><input type="checkbox"/> <b>Conservation Plan Signature page <u>only</u></b>  |
|                | <i>Note:</i> If the landowner is to be released from a federal contract, provide a copy of the recorded easement to the administering agency.  |
| 23) Date _____ | <b>Sent landowner a copy of the recorded easement.</b>   |
| 24) Date _____ | <b>Notification of Easement payment received from BWSR central office.</b>   |