

Landowner Name: _____ Easement ID # _____

Work Order # _____ Application ID # _____

SWCD CHECKLIST Conservation Easement Acquisition Part I

FOR ALL SIGN-UPS, SUBMIT ITEMS LISTED IN BOTH THE "APPLICATION PACKAGE" BOX AND THE "AGREEMENT PACKAGE" BOX. SUBMIT ALL ITEMS TO BWSR AS ONE PACKAGE.

Application Package:

- | | | |
|---|--|---|
| <input type="checkbox"/> Application | <input type="checkbox"/> CEFW | <input type="checkbox"/> Wetland Restoration Info form* |
| <input type="checkbox"/> Aerial Photo(s) | <input type="checkbox"/> Land Use & Soils* | <input type="checkbox"/> Scoresheet* |
| <input type="checkbox"/> Easement Area Assessment | | <i>*submit when applicable</i> |

Agreement Package:

- | | |
|---|--|
| <input type="checkbox"/> Agreement Information Form | <input type="checkbox"/> Shapefile of easement area |
| <input type="checkbox"/> Copy of the Deed | <input type="checkbox"/> Other documents as specifically requested |
| <input type="checkbox"/> Copy of Government Lot Maps, Trust, Partnership, and/or Corporation Documents* | <input type="checkbox"/> W-9 for easement payee (not co-payees) |
| | <input type="checkbox"/> Proof of Dept. of Ag Certification* |
| | <i>*submit when applicable</i> |

Application Stage

- 1) Date _____ **Application and Agreement package completed**
- 2) Date _____ **Local prioritization completed (when instructed by BWSR)**
 Screening Committee action (optional) _____ SWCD Action _____
 Approved by SWCD _____ Not approved by SWCD _____
 If the SWCD does not approve the application, stop here. Owner notified of the action on _____ (date)
- 3) Date _____ **Upload or 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 Stage

- 5) Date _____ **Final shapefile received from BWSR (if applicable)**
- 6) Date _____ **Landowner approval of new acreage, boundary, and payment (if applicable)**
- 7) Date _____ **Revised application documents submitted to BWSR (if applicable)**
- 8) Date _____ **BWSR offer approval letter delivered to FSA office (if applicable)**
- 9) Date _____ **CRP-1 approved and uploaded (if applicable). CRP Contract number: _____**
- 10) Date _____ **Agreement documents received from the BWSR central office.**
- 11) Date _____ **Review for correct grantor names (e.g. spelling), payment terms and amounts, etc. Date landowner contacted for signature: _____**
- 12) Date _____ **Obtain notarized signatures of grantors**
- 13) Date _____ **Signed agreement documents sent to BWSR central office, via certified mail**
- 14) Date _____ **One fully executed agreement document received from BWSR central office**

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

- ____ CEPPW (original or amended)
- ____ Conservation Plan map

- ____ Conservation Practice Plan
- ____ Conservation Plan Signature Page (send with recorded easement)

Easement Stage

- 15) Date _____ **Received updated property abstract from the landowner (if applicable)**
- 16) Date _____ **Requested title insurance commitment from title insurance agent**
- 17) Date _____ **Received title insurance commitment (Should be within 14 days of request.)**
- 18) Date _____ **Obtain copies of consents, subordinations, and other related documents pertaining to exceptions listed in Schedule B of title commitment**
- 19) Date _____ **Conservation Plan package completed and sent to BWSR (contains components listed above)**
- 20) Date _____ **Title insurance commitment and copies of related documents mailed or emailed to BWSR (email to bwsr.rim@state.mn.us)**
Notes: 1) Title commitment must be sent to BWSR in the same format as originally received. 2) Do not send originals of consents or other documents that need to be recorded. 3) If lender suddenly requests to be listed as a co-payee, and they are not already listed as such on the agreement, request written permission from the landowner to add the lender as a co-payee, and forward it to BWSR.
- 21) Date _____ **Received easement with attached legal description and exhibit(s) from BWSR central office. Date landowner contacted for signature: _____**
- 22) Date _____ **All notarized landowner(s) signatures 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 Payment Distribution Form for Multiple Grantors completed and signed by the landowner(s).
 - ____ Verified that any environmental problems have been resolved.
- 23) 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.
- 24) Date _____ **Recorded easement and final title insurance policy received.**
- 25) Date _____ **Sent by certified mail to BWSR:**
 - ____ Original, recorded easement document
 - ____ Original, recorded mortgage consent (if applicable)
 - ____ Final title policy
 - ____ Conservation Plan Signature page only*Note: If the landowner is to be released from a federal contract, provide a copy of the recorded easement to the administering agency.*
- 26) Date _____ **Sent landowner a copy of the recorded easement.**
- 27) Date _____ **Notification of Easement payment received from BWSR central office.**