

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).*

**Go to next page: SWCD CHECKLIST, Conservation Easement Acquisition, Part II**

**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](mailto: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