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

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<td>_____ Conservation Plan Workbook (complete all tabs)</td>
<td>_____ Title Insurance Commitment</td>
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<tr>
<td>_____ Conservation Plan Map</td>
<td>_____ Copies of Recorded Exception Docs (Review B-II)</td>
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<tr>
<td>_____ Copy of Signed Mortgage Subordination (if applicable)</td>
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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