



# Blue Ridge Land Conservancy

## Fee Simple Donation Application Form

Please fill out this form to initiate the process of a fee simple donation of property to the Blue Ridge Land Conservancy. For assistance, contact (540) 985-0000 ext.1, or e-mail [dperry@brlcva.org](mailto:dperry@brlcva.org).

Return to: Blue Ridge Land Conservancy  
The Lemon House, 1305 Maple Ave. SW  
Roanoke, VA 24016  
Or by email to [dperry@brlcva.org](mailto:dperry@brlcva.org)

### Landowner information

Name(s): \_\_\_\_\_  
Address at which you receive mail: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_  
Telephone: (Home) \_\_\_\_\_ (Work) \_\_\_\_\_  
(Cell) \_\_\_\_\_  
E-mail: \_\_\_\_\_

### Property information

Property owner(s) as listed on deed: \_\_\_\_\_  
\_\_\_\_\_  
Address of property OR nearest crossroads: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_  
Number of Acres \_\_\_\_\_  
Tax map and parcel number(s): \_\_\_\_\_  
Do you own other property in the immediate area?  Yes  No  
If yes, please list parcel number(s): \_\_\_\_\_  
Do you have a recent survey?  Yes  No Date: \_\_\_\_\_

### Property characteristics

Acres in forest: \_\_\_\_\_ Acres in crops: \_\_\_\_\_

Acres in pasture: \_\_\_\_\_ Acres in other: \_\_\_\_\_

Please describe the property's current use: \_\_\_\_\_

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Does the property have springs, streams or water frontage?  Yes  No

If yes, please describe: \_\_\_\_\_

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Does the property have unique resources (historic buildings or sites, caves, endangered species)?  Yes  No

If yes, please describe: \_\_\_\_\_

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Please list all dwellings (homes, cabins, barn apartments, stationary trailers) on the property: \_\_\_\_\_

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List other buildings on the property like barns, sheds, stables or milking parlors:

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**Liens/disputes/existing easements**

Are there any boundary issues with neighbors?  Yes  No

If yes, please describe: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you have any mortgages or are there any liens on the property?  Yes  No

If yes, please describe, listing amounts and lienholder: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Are there any other easements on the property, such as for power lines, gas lines, or neighbor access rights?  Yes  No

If yes, please describe: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Are the mineral rights on the property intact?  Yes  No

If no, please explain: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Professional Advisor Information

### Attorney

Have you selected an attorney with whom you wish to work?  Yes  No

*(The Blue Ridge Land Conservancy strongly recommends that each donor work with an experienced attorney. The land conservancy can recommend experienced counsel if requested.)*

If yes, please provide your attorney's information:

Name and firm: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Telephone: \_\_\_\_\_

E-mail: \_\_\_\_\_

### Appraiser

Have you selected an appraiser with whom you wish to work?  Yes  No

*(An appraisal of your donated property by a qualified appraiser specifically for income tax purposes will be required if you wish for your donation to qualify for federal and/or state tax benefits. The land conservancy can recommend a qualified appraiser if requested. The Blue Ridge Land Conservancy does not guarantee that a donated property will qualify for tax benefits.)*

If yes, please provide your appraiser's information:

Name and firm: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Telephone: \_\_\_\_\_

E-mail: \_\_\_\_\_

## Conservation Easement Consent and Acknowledgement

**No obligation.** The Blue Ridge Land Conservancy (BRLC) reserves the right not to participate in any transaction for any reason, and to withdraw from the conservation donation process at any time.

**No legal or tax advice.** BRLC does not provide legal or tax advice. You are strongly encouraged to consult with your advisors on estate planning and tax matters related to the fee simple donation of property and have an attorney assist you in drafting and the review of your donation throughout the process.

**Qualifying donations.** Your donation must meet federal and state requirements, as applicable. The land conservancy makes no assurances regarding the deductibility of any gift. BRLC strongly recommends landowners have legal counsel assist with the drafting and review the donation prior to its execution.

**Appraisals.** For gifts of property that have a value greater than \$5,000, BRLC requires that a qualified appraisal is obtained from a qualified appraiser to determine the value of the gift. Additionally, BRLC will request a copy of this appraisal after it is completed. BRLC strongly suggests that you employ a Certified General Appraiser experienced in conservation easement appraisals who follows Uniform Standards of Professional Appraisal Practice (USPAP). You should understand that the timing and quality of your appraisal may impact the tax benefits you may receive from your donation. BRLC makes no assurances regarding appraisals or easement valuations.

**Federal and state tax benefits.** In order to claim the VA state income tax credits from the gift of an easement, you will be required to send form LPC-1 to the VA Department of Taxation.

**No obligation to participate or sign 8283.** BRLC reserves the right not to sign the IRS Form 8283 for a gift in excess of \$5,000 if it has concerns about the appraisal methodology, valuation or other concerns. The Form 8283 must be completely filled out and BRLC must have an opportunity to review the appraisal to determine its appropriateness, prior to signing the Form 8283. BRLC shall not participate in transactions in which it has concerns about the appraiser, appraisal methodology, valuation or tax deduction. BRLC will require that it review the appraisal *prior to it accepting the gift of property*.

**Deeds, title work and surveys.** As part of the donation process, BRLC may request a copy of your property deed(s), a 60-year title opinion to help prove clear title to your property, and a survey plat if available. BRLC may also request a new survey if clear property boundaries cannot be determined. For properties owned by an LLC or other pass-through entity, BRLC may require additional information about the entity, including but not limited to its articles of organization, proof of registration with state government, and a list of members.

**Costs and fees.** You are responsible for your own attorney's fees, appraiser's fees, title search and opinion fees, surveyor's costs, and any other expenses you may incur. You may be required to pay a one-

time fee to the Blue Ridge Land Conservancy for future stewardship of the property. This fee is due before the easement is recorded. There are no other fees due to BRLC for information or assistance with your donation.

I have read and acknowledge the above information and understand the information presented. The information I have provided is correct to the best of my knowledge.

Landowner Signature(s):

\_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_