

INSTRUCTIONS

<https://www.dhr.virginia.gov/easements/>

Applicants must provide **all** information requested; incomplete applications will not be considered. Applications are evaluated and reviewed by Virginia Department of Historic Resources (DHR) Easement Program Staff and the Easement Acceptance Committee before being presented to the Virginia Board of Historic Resources. For additional information, please refer to *Easement Program Policy #2: Criteria for Acceptance of Easements*, available at the following web link: https://www.dhr.virginia.gov/pdf_files/easement/VBHR_Easement_Program_Policy_2_Criteria_Acceptance_Easements.pdf

This Easement Application Form contains four parts:

- Part A: General Application Form--**must be completed by all applicants**
- Part B: Application Checklist-- **must be completed by all applicants**
- Part C: Grant Related Projects (as applicable)
- Part D: Federal and/or State Tax Incentives (as applicable)
- Part E: Title Commitment/Policy Requirements

The application may be completed in PDF or Microsoft Word format. Please attach additional sheets as necessary to complete your responses to any questions contained herein.

A completed application consists of the following:

1. Application Form: including Parts A and B (required) and Parts C and D (as applicable)
2. All required documentation as listed on the Application Checklist
3. \$500.00 application fee



Application Fee: a \$500.00 application fee is due with the application. Refer to the attached Billing Statement to submit the application fee. A check for the fee must be provided in accordance with the instructions on the Billing Statement at the same time the application is submitted. DHR is unable to accept credit cards or other electronic payments. **Applications will not be reviewed until the application fee has been received by DHR.**

To allow for adequate processing time, your completed application form and supporting materials must be received via postal mail or electronic submission **no later than thirty (30) calendar days** prior to a scheduled Easement Acceptance Committee meeting. Any applications received after the deadline will automatically be placed on the agenda for the subsequent meeting. Please contact the Easement Program Specialist for the full meeting schedule. If you intend to email the application and supporting materials, and the email size is greater than 20MB, please contact the Easement Program Specialist for large file transfer options. **If you email your application, the application fee and billing statement must be mailed separately.**

It is the responsibility of the applicant to ensure that all necessary materials are submitted prior to the deadline. DHR staff will confirm receipt of the application by email only, and will notify the applicant if the application is incomplete and will not be considered. However, if you do not receive an email confirming receipt within five (5) business days of submission please contact the Easement Program Specialist.

Email Completed Applications To:

EasementApplication@dhr.virginia.gov

Or Submit Via Postal Mail To:

Karri Richardson
Easement Program Specialist
Virginia Department of Historic Resources
2801 Kensington Avenue
Richmond, Virginia 23221
karri.richardson@dhr.virginia.gov
804-482-6094



VIRGINIA DEPARTMENT OF HISTORIC RESOURCES
EASEMENT APPLICATION FORM
PART A: GENERAL APPLICATION

Updated June 2021
<https://www.dhr.virginia.gov/easements/>

A-1. TRACT/PROPERTY INFORMATION		
Property/Project Name:		County/City:
Property Street Address:		
City/Town:	State:	Zip Code:
Total Acres Proposed for Easement:		
Total Acres of Property (if different from acreage to be eased):		
Tax Map ID or PIN No(s):	Parcel Area (Acres):	Proposed Easement Area (Acres):
A-2. OWNERSHIP INFORMATION		
Is the property owned by a corporate entity? <input type="checkbox"/> Yes <input type="checkbox"/> No		Is the property held in trust? <input type="checkbox"/> Yes <input type="checkbox"/> No
Owner #1		
Contact Name:		
Address:		
City/Town:	State:	Zip Code:
Phone:	Email:	
Owner #2 (As Applicable)		
Contact Name:		
Address:		
City/Town:	State:	Zip Code:
Phone:	Email:	
A-3. APPLICANT INFORMATION (IF DIFFERENT FROM OWNER)		
Applicant Name/Organization:		
Contact Name & Title:		
Address:		
City/Town:	State:	Zip Code:
Phone:	Email:	
(i). Is the applicant submitting this application on behalf of the property owner? <input type="checkbox"/> Yes <input type="checkbox"/> No		
(ii). If the applicant intends to acquire the property, what is the anticipated date of closing? _____		
(iii). Will the property be owned by a corporate entity at the time of easement recordation? <input type="checkbox"/> Yes <input type="checkbox"/> No		
<i>Note: If applicant is different from property owner, owner must submit a signed letter indicating that the applicant is authorized to submit an application on their behalf and that DHR is authorized to communicate with the applicant regarding owner's property.</i>		
A-4. SITE/LANDSCAPE DESCRIPTION		
Briefly describe the property (e.g. topography, adjacent streets/roads, water bodies, adjacent development).		

A-5. ARCHITECTURAL, ARCHAEOLOGICAL, AND HISTORIC RESOURCES:	
(i). Is the property listed on the Virginia Landmarks Register (VLR)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Individually	Date of Listing:
<input type="checkbox"/> As a contributing resource to an historic district	District Name:
(ii). Is the property listed on the National Register of Historic Places?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Individually	Date of Listing:
<input type="checkbox"/> As a contributing resource to an historic district	District Name:
(iii). Has the property been found eligible for listing on the VLR by the Virginia State Review Board? If yes, please attach a copy of the Preliminary Information Form.	<input type="checkbox"/> Yes <input type="checkbox"/> No
(iv). Has the property been identified and documented by a recognized organization (such as an historical society) as having local historical significance? If yes, please explain.	
(v). Are you aware of any archaeological resources on the property, such as a prehistoric or historic archaeological site that has been recorded with DHR including structural remains/ruins, Native American habitation site, military encampment, or earthworks? If yes, please describe the resource(s), indicate the location(s) on a map, and note if any resource(s) have been documented through professional archaeological survey.	
(vi). Are you aware of any cemeteries or burials on the property? If yes, please indicate the location on a map and provide other identifying information such as number of burials, grave markers and associated death dates (earliest death date and latest date), decedent/family names, fences or other enclosures, as available. Indicate whether or not the cemetery is still actively used for burials.	
(vii). Does the property contain resource(s) representing Virginia's culturally diverse history, such as those associated with Enslaved peoples (ca. 1619-Civil War), the Reconstruction Era (1861-1898), the Civil Rights Movement, LGBTQ, African-American, Asian-American, Latino, Hispanic, Native American and women's history or other historic or cultural context in Virginia that is not well understood? If yes, please describe the resource(s) and attach supporting materials such as photographs, letters, oral histories, community narratives, or maps if available.	

(viii). If the property or area has special historic significance (50 years or older) to a specific group or community, please describe.

A-6. BATTLEFIELD(S):

If the property is within the boundaries of a **Virginia Civil War battlefield** that has a priority rating identified in *The Report on the Nation's Civil War Battlefields (1993)*, available at the following web link: <https://irma.nps.gov/DataStore/Reference/Profile/2274482>, please provide the applicable rating. Include the full rating (e.g. Priority III.2) and identify all battlefields within which the property is located.

Name of Civil War Battle/Battlefield:

Priority: I II III IV. _____

Class: A B C D

Approx. Acres in Core Area:

Approx. Acres in Study Area:

Provide a brief description of the specific battle actions or troop movements that occurred on the property.

Name of Civil War Battle/Battlefield (as applicable):

Priority: I II III IV. _____

Class: A B C D

Approx. Acres in Core Area:

Approx. Acres in Study Area:

Provide a brief description of the specific battle actions or troop movements that occurred on the property.

Name of Civil War Battle/Battlefield (as applicable):

Priority: I II III IV. _____

Class: A B C D

Approx. Acres in Core Area:

Approx. Acres in Study Area:

Provide a brief description of the specific battle actions or troop movements that occurred on the property.

If the property is a **Virginia Revolutionary War or War of 1812 site** that has a priority rating identified in the *Report to Congress on the Historic Preservation of Revolutionary War and War of 1812 Sites in the United States* (2007) (<https://irma.nps.gov/DataStore/Reference/Profile/2274495>) please provide the significance category and integrity rating.

Name of Revolutionary War/War of 1812 Battlefield or Site (as applicable):

Priority I
 Priority II
 Priority III
 Priority IV
 Needs Further Study
 Commemorative Opportunity
 Class A

 Class B

 Class C

 Class D

Provide a brief summary description of the site and its historic significance, including the specific military actions or events that occurred on the property and/or its association with related government or citizen actions. Evaluate significance according to any criteria established by the American Battlefield Protection Program.

A-7. OTHER CONSERVATION VALUES:

Check all that are currently applicable to the property:

<input type="checkbox"/> Perennial rivers, streams, or bodies of water	<input type="checkbox"/> Within Virginia Piedmont Heritage Area
<input type="checkbox"/> Intermittent rivers, streams, or bodies of water	<input type="checkbox"/> Frontage on designated Virginia Byway
<input type="checkbox"/> Existing riparian buffers at least 35' in width	<input type="checkbox"/> Frontage on designated Virginia Scenic River
<input type="checkbox"/> Lies on waterway used for public drinking water	<input type="checkbox"/> Contains or connects to public greenway or trail
<input type="checkbox"/> Livestock fenced from waterways	<input type="checkbox"/> >20 acres of forested cover
<input type="checkbox"/> Prime agricultural soils	<input type="checkbox"/> Forest Management Plan
<input type="checkbox"/> Agricultural Conservation Plan	<input type="checkbox"/> Habitat of designated rare or endangered species
<input type="checkbox"/> Active agricultural use	<input type="checkbox"/> Adjacent to local, federal, or state park
<input type="checkbox"/> Wetlands identified in National Wetlands Inventory	<input type="checkbox"/> Adjacent to existing conservation easement
<input type="checkbox"/> Within Chesapeake Bay watershed	<input type="checkbox"/> Within Shenandoah Valley Battlefields NHD
<input type="checkbox"/> Within Journey Through Hallowed Ground NHA	<input type="checkbox"/> Other:

A-8. GENERAL QUESTIONS ABOUT PROPERTY

- (i). Does the property receive land use taxation from the County? Yes No
- (ii). Do you own other property in the immediate area or plan to hold contiguous land out of easement? If yes, please provide tax parcel or PIN numbers. Yes No
- (iii). Have mineral rights (e.g. oil, gas, coal, etc.) been sold, deeded or leased to another party? If yes, please explain and provide a copy of all pertinent documents. Yes No
- (iv). Is there a boundary survey (within the past year) of the property or any portion of it? Yes No
- (v). Has the property been previously platted for subdivision? If yes, provide a copy of the plat and note what site work and/or improvements were completed in preparation for construction. Yes No

(vi). Are there any deed restrictions, covenants, or homeowners association agreements that impact the property? If yes, briefly describe and provide a copy of any related documents. Yes No

(vii). [If applicable] What is the nature, extent, and severity of the threat(s) to the historic integrity of the property? Threat is generally defined as a property that is on the market and listed for sale, up for auction, in foreclosure, platted for subdivision, within a newly designated growth area, or at risk from flooding or natural disasters.

A-9. EXISTING CONDITIONS AND USES OF THE PROPERTY

(i). Describe all current uses of the property (e.g. residential, agricultural crop production, animal husbandry, equestrian uses, timber harvesting/replanting, battlefield park, or vacant land, etc.).

(ii). Describe past uses of the property (e.g. residential, agricultural crop production, animal husbandry, equestrian uses, timber harvesting/replanting, battlefield park, vacant land, etc.). When answering, please provide information as far back as possible and include estimated dates (e.g. timbered in 1950s; residence constructed in 1980s, etc.).

(iii). To your knowledge, has any portion of the property ever been used for any of the following activities?

Activity	Activity Previously Occurred on Property	Activity Currently Occurs and/or Feature Exists on Property
Relic hunting, collecting or digging for artifacts	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Metal detecting	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Reenactment or similar event	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Sand or gravel mining	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Installation of a septic system(s)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Installation of a water well(s)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Installation of a public water line	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Installation of below-ground utility	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Installation or removal of underground storage tank(s)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Construction of a road or drive	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Installation of agricultural drain tiles or buried irrigation lines	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Timber harvest	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Planting of timber for future harvest	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Construction of a pond or dam	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Installation of below-ground pool	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Large-scale grading (> 0.50 acre)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

(iv). Are you aware of any significant ground disturbing activities not identified above that have occurred or will occur on the property? Yes No

(v). List all buildings and structures on the property (historic and non-historic), their approximate age, condition (ruin, poor, fair, good, excellent), and use (e.g. residential, agricultural, commercial, storage). Include all dwellings, tenant houses, outbuildings, barns, sheds, etc. and structures such as pools, wells, septic systems, and utilities. Attach additional pages if necessary.

Building/Structure	Age (Years)	Condition	Use

(vi). Identify any anticipated alterations to existing buildings, structures and/or landscape features. Of the buildings and structures identified above, are there any that you intend to demolish and remove from the property? If yes, describe your plans.

(vii). Describe plans for future changes in the use of the property and any anticipated new construction, whether residential, agricultural, or interpretative in nature. Note any proposed landscape changes.

A-10. RESERVED RIGHTS

Please indicate which of the following you would like to reserve in the easement, as applicable:

Reserved Right	Number	Approx. Size
Division (please consider the property as a whole when answering)		
New primary dwellings		
New secondary dwellings (e.g. tenant house or guest house)		
New residential outbuildings & structures (e.g. shed, pool, garage)		
Type:		
Type:		
New agricultural buildings & structures (include greenhouses, equestrian, and viticulture/viniculture in this category)		
Type:		
Type:		
New interpretative buildings & structures (e.g. kiosk, visitors center, bathrooms, shelter, interpretative center):		
Type:		
Type:		
New roads or trails (e.g. paths, trails, roads, or parking facilities)		
Type:		
Type:		
Timber Harvesting & Replanting		
Other:		
Other:		

A-11. PUBLIC ACCESS

(i). Is the property open to the public at any time during the year (e.g. house tour, battlefield tour, commemorative event, family reunions, etc.)? If yes, please briefly describe. Yes No

(ii). Is the property visible from a public right-of-way? If yes, please identify the road or street name and route number, as applicable. Yes No

Note: DHR currently requires that the easement property be physically open to the public a minimum of two calendar days per year. The easement deed will contain a provision requiring this public access, including interiors of historic built resources, subject to certain restrictions.

A-12. LEGAL MATTERS

(i). Is there a mortgage, home equity loan, or other lien on the property? If yes, please list and indicate whether the lien will be released prior to recordation of the easement. Yes No

(ii). Are there any residential, agricultural, commercial, hunting, or other written leases or agreements currently in effect on the property? If yes, please identify and indicate if they will be in effect at the time of easement recordation. Yes No

(iii). Are there any verbal agreements in effect for use of the property? If yes, please describe. Yes No

(iv). To your knowledge, has a Phase I Environmental Site Assessment ever been prepared for the property? Were there any issues identified that required remediation? If yes, please describe. Yes No

(v). Does the property have any environmental contamination issues? Has any portion of the property ever been remediated for environmental contamination? Are there any underground storage tanks or other known environmental risks on the property? If yes, please describe. Yes No

(vi). Identify any other information about the property or its condition not otherwise covered, such as boundary line disputes, outstanding life estates, third party access easements through the property, matters involving public infrastructure projects or pending takings by the Commonwealth or any public utility, etc.

(vii). Have you been provided with a copy of and reviewed DHR's easement template? Yes No

(viii). Have you spoken with an Easement Program staff member about this application or placing an easement on your property? Yes No

(ix). Please provide contact information for your attorney.

Attorney Name:

Firm

Address:

City/Town:

State:

Zip Code:

Phone:

Email:

A-13. ADMINISTRATIVE FEE POLICY

All historic preservation and conservation easements conveyed to the Virginia Board of Historic Resources are subject to *Easement Program Policy #12: Administrative Fees*, available at: [https://www.dhr.virginia.gov/wp-content/uploads/2021/03/VBHR Easement Program Policy 12 Administrative Fees.pdf](https://www.dhr.virginia.gov/wp-content/uploads/2021/03/VBHR_Easement_Program_Policy_12_Administrative_Fees.pdf). There are specific fees applicable to new easement offers:

- **Application Fee:** an application fee of \$500 covers DHR’s due diligence analysis of the proposed easement offer and is due at the time the application is submitted.
- **Grant Funded Easements:** a fee of \$10,000 will be assessed against any easement offers that are funded by any grant funding source, excluding grants funded by the Commonwealth of Virginia. This fee will be invoiced at the time DHR schedules the baseline documentation site visit.
- **Reconsideration of Easement Offer:** a fee of \$1,000 will be required for reconsideration by the Board of any previously approved offer of easement where such reconsideration is a result of: (i) the expiration of the Board’s prior approval, or (ii) a change in the terms of the easement offer due to an act or omission of or a modification made or proposed by the applicant and/or landowner. This fee must be received by DHR with the new application.
- **Baseline Documentation:** A fee of \$1,500 will be assessed against the landowner in each instance where a baseline documentation report (“BDR”) is required to be updated or revised because (i) the terms of the easement have changed or (ii) the easement is not recorded within six months of completion of the BDR. Such fee is due prior to DHR conducting the work to update or revise the BDR.

A-14. CERTIFICATION STATEMENT AND SIGNATURE(S) OF APPLICANT(S)

The undersigned applicant(s) understands and hereby acknowledges that all determinations by DHR and/or the Virginia Board of Historic Resources (“Board”) regarding proposed historic preservation and open-space easements shall be made at DHR’s and/or the Board’s sole discretion and further that DHR and/or the Board reserves the right to accept or deny any proposed gift, donation or transfer at any point during its due diligence phase based on its own internal policies and procedures or other factors deemed relevant by DHR and/or the Board. The applicant further certifies hereby that (i) it has received and reviewed the Administrative Fee and Appraisal Policies, (ii) the information set forth above is true and accurate to the best of applicant’s knowledge and (iii) that any material change of fact or circumstance thereto shall be made known to DHR prior to recordation of the easement. Failure to comply with any portion of the above Certification Statement shall constitute grounds for rejection of the easement application or revocation of an approval by the Board. *Neither DHR or the Board give legal or tax advice and recommends that owners consult their attorney, accountant, and/or tax advisor regarding the legal and tax implications of conveyance of a perpetual easement.*

SIGNATURE	NAME	DATE



VIRGINIA DEPARTMENT OF HISTORIC RESOURCES
EASEMENT APPLICATION FORM
PART B: CHECKLIST

Updated June 2021
<https://www.dhr.virginia.gov/easements/>

The following documents must be submitted with your application. Failure to provide all required documentation may delay processing or acceptance of your application.

- B-1. **Application Form:** Parts A and B completed and signed by applicant. Parts C and D completed as applicable.
- B-2. **Application Fee:** per *Easement Program Policy #12: Administrative Fees*, a fee of \$500.00 must be submitted with your application. Only checks made payable to the Virginia Department of Historic Resources are accepted.
- B-3. **Authorization:** if applicant is different from property owner, owner must submit a signed letter indicating that the applicant is authorized to submit an application on their behalf and that DHR is authorized to communicate with the applicant regarding owner(s)' property, the easement application, required documentation and easement negotiation process.
- B-4. **Photographs:** high-quality digital photographs or images (resolution of 600 pixels x 600 pixels in jpeg format preferred) must include the following:
 - *At a minimum*, photographs should comprehensively document the overall site, setting, and landscape of the property, and include images of ALL historic and non-historic buildings, structures, roads, and other features.
 - A photopoint map indicating the location of photos.
- B-5. **Title Commitment & Insurance:** applicant must obtain a title insurance policy insuring the "*Commonwealth of Virginia, Board of Historic Resources*" that includes the following:
 - Continuous chain of title of ownership interests for the property (with copies of all relevant documents) dating back to at least 1940 must be submitted with the easement application.
 - Title commitment prepared by a Virginia licensed title searcher, title company, or attorney.
 - Must include legible copies of all deeds and plats in the chain of title ownership and all encumbrances identified as exceptions in the commitment.
 - A title commitment insuring the donor's acquisition of the property may be submitted with the application. However, once acquisition is complete, a title commitment insuring the Board of Historic Resources must be provided.

*Please see **Easement Title Commitment Policy Requirements** document for detailed information on requirements. The donor/applicant is responsible for obtaining the title insurance policy and any associated settlement costs.*

- B-6. **Maps:** aerial, topographical, or other GIS image(s) clearly marked with the following information:
 - The legal property boundaries of the proposed easement area; indicate any adjacent parcels under the same ownership but outside of proposed easement area;
 - The boundaries of the core and/or study areas for Virginia battlefields;
 - The location of troops and/or military activity in relationship to the property;
 - Other nearby protected parcels, if applicable; and
 - Aerial images that document prior land uses, as applicable.
- B-7. **Boundary Survey:** a current (within one year) boundary survey prepared by a Virginia licensed surveyor is required for all easement projects. If a current survey is not available at the time the easement application is submitted, a preliminary survey should be provided to DHR for review as soon as possible and in order for the project to be considered by the Board. DHR will review a draft preliminary survey as part of the application process. The survey should show and/or indicate the following as applies to the property:
 - Exterior dimensions of all buildings and structures at ground level;
 - Indicate square footage of exterior footprint of all buildings and structures at ground level; and
 - Location of easements and/or utilities existing on or serving the surveyed property.

- B-8.** Proof of Insurance: copy of general liability insurance policy and homeowners policy (as applicable) is required. *Note: Prior to easement recordation, the Virginia Board of Historic Resources ("Board"), DHR, and the Commonwealth of Virginia must be added to the policy as additionally insured.*

The following documents must be submitted with your application to the property, as applicable:

- B-9.** National Register/Virginia Landmarks Register Nomination Form, available at the following web link: <https://www.dhr.virginia.gov/historic-registers/> or Preliminary Information Form, as applicable.
- B-10.** Leases and Other Agreements: copies of all residential, agricultural, commercial or other lease agreements that will be in effect at the time of easement recordation must be submitted with the application. Unless otherwise approved by DHR, any unrecorded lease or lease agreement that will be in effect at the time of recordation of the easement must include subordination language provided by or approved in advance by DHR. Existing leases or lease agreements may need to be amended to include the appropriate subordination language.
- B-11.** Mortgage or Other Lien: for any mortgage or lien that will be in effect at the time of easement recordation, the following documents must be provided:
- Written documentation from lender(s) indicating their willingness to subordinate the lien to the easement.
 - Name and position of individual who will be signing on behalf of the lender(s) and document identifying that individual as authorized to sign on behalf of the lender(s).
 - Name of Trustee(s) who will be signing on behalf of the lender(s).
 - Recorded Appointment of Substitute Trustee document (as applicable).
- B-12.** Organizational and Authorization Documents: if the property is owned by an LLC or other corporate entity, the following must be provided:
- Copies of Articles of Incorporation and Bylaws;
 - Proof of Registration with SCC and Certificate of Existence/Good Standing (not more than 60 days old);
 - Certificate of incumbency identifying who is authorized to sign on behalf of the entity (which may be included in the resolution or consent below); and
 - Certified resolution from the organization or consent of directors that states: (1) the transaction is authorized by the organization's decision-makers, and (2) the person signing the documents is authorized to sign on behalf of the organization and execute documents such as contracts, deeds, purchase agreements, options, and easements as it pertains to transfers of real estate interests.
- B-13.** Trust Agreement: if property held in trust, copy of trust agreement, deed of trust, will or other document(s) that created the trust.
- B-14.** Covenants, Leases and Other Unrecorded Documents: copies of the following documents must be submitted with the application: deed restrictions, covenants, and/or homeowner's association agreements, unsecured notes, agricultural leases, residential leases, etc.
- B-15.** Environmental: copy of Phase I Environmental Site Assessment.
- B-16.** Forestry: copy of Forest Management Plan and any prior pre-harvest plans, or documentation from the Virginia Department Forestry related to any timber harvests that have occurred on the property.
- B-17.** Agricultural: copy of Farm Conservation Plan or other best management practice (BMP) document.
- B-18.** Natural Heritage: documentation identifying threatened, rare, or endangered species on the property.
- B-19.** Letter of Intent: for any transaction that will be a full or partial donation of easement and for which the owner intends to pursue tax benefits, the property owner(s) must submit a separate letter of intent indicating their desire to place a perpetual historic preservation and conservation easement over their property.



VIRGINIA DEPARTMENT OF HISTORIC RESOURCES
EASEMENT APPLICATION FORM
PART C: GRANT FUNDED PROJECTS

Updated June 2021
<https://www.dhr.virginia.gov/easements/>

Complete this section only if you intend to use a federal and/or state grant as part of the easement transaction

C-1. GENERAL QUESTIONS

(i). Will any grant funds be used to acquire the property in fee-simple? Yes No

(ii). Will any grant funds be used toward purchase of an easement on the property? Yes No

(iii). Are any other grants associated with this project (e.g. Save America's Treasures) that require conveyance of an easement? Yes No

(iv). Please indicate which grants will be applicable to this transaction:

Grant or Funding Source	Anticipated Amount	Application Status (e.g. Applied, Approved, Funds Allocated)	Purpose of Grant (e.g. Fee-Simple Acquisition, Easement Acquisition, Rehabilitation)
American Battlefield Protection Program			
Virginia Battlefield Preservation Fund			
Virginia Land Conservation Fund			
Other:			

(v). Describe the project outcome - who will own the property and how will it be managed?

(vi). For American Battlefield Protection Program BLAG grants please indicate the status of the Section 106 Review process and note whether the record for the property has been updated in DHR's VCRIS system.

(vii). For all grants identified above, please indicate the deadline or date by which the conservation easement must be recorded.

C-2. PURCHASE OF CONSERVATION EASEMENT

Will the grant funding fully purchase the value of the easement? Yes No

If no, do you intend to claim a Virginia Land Preservation Tax Credit (LPTC) or federal income tax deduction for donation of the gift portion of the easement value?

Virginia Land Preservation Tax Credit: Yes No

Federal Income Tax Deduction: Yes No

(If yes, complete Part D of this application).



VIRGINIA DEPARTMENT OF HISTORIC RESOURCES
EASEMENT APPLICATION FORM
PART D: FEDERAL AND STATE TAX INCENTIVES

Updated June 2021
<https://www.dhr.virginia.gov/easements/>

Complete this section only if you intend to apply for state land preservation tax credits or a federal income tax deduction related to donation of the easement

Information about the LPTC application process can be found on the Virginia Department of Taxation website at <https://tax.virginia.gov/land-preservation-tax-credit>, and the Virginia Department of Conservation and Recreation’s website at <https://www.dcr.virginia.gov/land-conservation/lp-taxcredit>

D-1. GENERAL QUESTIONS
(i). Do you intend to claim a Virginia Land Preservation Tax Credit (LPTC) for donation of the historic preservation and open-space easement? <input type="checkbox"/> Yes <input type="checkbox"/> No
(ii). Will the value of the Virginia LPTC exceed \$1 million? <input type="checkbox"/> Yes <input type="checkbox"/> No
(iii). Do you intend to claim a federal income tax deduction for donation of the historic preservation and open-space easement? <input type="checkbox"/> Yes <input type="checkbox"/> No
(iv). Do you intend to use a combination of grant funding and a land preservation tax credit/federal income tax deduction as part of the easement transaction? Will this be a partial sale, partial gift transaction? <input type="checkbox"/> Yes <input type="checkbox"/> No
(v). Has a preliminary conservation easement appraisal been completed? <input type="checkbox"/> Yes <input type="checkbox"/> No
(vi). Please provide the approximate value of the easement (if known).