

**J. CHET ROGERS, LLC**  
Commercial Real Estate Appraiser  
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## Conservation Easement Checklist

The following data is required for this assignment, as applicable. Please indicate if not applicable.

1. Surveys, legal descriptions, and title reports of the subject property as well as any other real estate contiguous to the subject that is owned by the easement donor or the donor's immediate family.
2. Closing statement(s) and deed(s) of any transfer(s) in the last 10 years
3. Is there a mortgage on the property?                      If so, who is the mortgagee?
4. Contract(s) on any proposed or pending sale(s) in the last 10 years.
5. Is there a life estate on the property?
6. Any written offers to list, sell, buy, or lease the property in the last 10 years
7. Status of any property tax appeals or reviews
8. Zoning and POD approvals, with proffers; status of any proposed or pending zoning changes
9. Proposed easement agreement and plat showing the easement area
10. Description of the relevant conservation attributes of the property (recreation/education, natural habit, open space, scenic, and/or historic significance). Done in consultation with the donee that will be accepting the easement donation
11. Topographical/soils map and any available aerial photography
12. Plat/site plans
13. Copies of any soils, environmental, wetland assessments
14. Inventory of structures noting age, and existing and proposed use

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15. All third party rental agreements (w/amendments or pending changes)
16. Project cost breakdown and timing
17. All agreements with adjacent property owners or any other agreements related to the use and development of the subject property
18. Any changes in the operation or unusual conditions that should be considered in our analysis
19. Marketing brochure(s) for subject and similar properties
20. Any existing agreements such as mitigations or quid pro quos on the subject. Please verify that this is a donation of your own free will and with no strings attached.
21. A list (including a brief description and location) of any real estate that is located in the vicinity of the subject property that is owned by the easement donor or any person or entity that is a related person. This includes any other real estate located near the subject property that is owned by you, your immediate family, or any trust, estate, corporation, partnership, LLC, or other entity you (or a member of your immediate family) have a significant interest in. Immediate family means siblings, parents and grandparents, children and grandchildren of all owners. Please seek legal counsel if you have any questions whether there is any such real estate. The appraiser may need more information on any such real estate.
22. Any other information that you feel may be relevant to the valuation of the subject property
23. Address of the subject property
24. Date the CE was recorded and the book/page.
25. Contact person and phone number
26. Please acknowledge that this appraiser makes no claims to be a tax advisor, and that you will seek professional tax advice as needed.