



PRESERVATION TRUST FUND EASEMENT ASSISTANCE APPLICATION

General Information

Each owner, entity, and entity member/s must submit tax forms and provide contact information on page 4.

Main contact for property: _____

Locality: _____ Number of Acres: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____

Email: _____

Property Tax Map Parcel(s): _____

Address for Parcel if different from mailing: _____

City: _____ State: _____ Zip Code: _____

Name of Trust, LLC, or other entity, if applicable: _____

Please submit entity tax forms and provide member contact information on page 4.

Is the property a family-owned or family operated farm or forest? Yes No

List crops, livestock, and/or farm or forest products produced, and list acreage devoted to each.

Describe family's involvement in farm or forestland operation (family employment full/part-time, etc.).

Length of family ownership _____

Required Documentation

Return the following documents to the Virginia Outdoors Foundation by email to your VOF Easement Project Manager or by mail to: PO Box B, Blacksburg, VA 24060

_____ Completed application

Return the following documents to the Virginia Outdoors Foundation through the use of this secure link: <https://vof.app.box.com/f/ba12a9bc675f4f3bb25c62466d9fe633> or by mail to the address above.

Do not send tax material by email.

_____ Copies of IRS tax returns (pages 1 and 2 for the most recent two years available for each owner/entity and for each entity member if applicable)

_____ Completed Commonwealth of Virginia W9 Tax Form

_____ Non-Filer Affidavit (page 5), if applicable

Landowner Signature: _____ **Date:** _____

Reimbursement Rates

Landowner Annual Income	Reimbursement Rate	Average Award	Easement Assistance Limit
Up to \$70,000	100%	\$14,000	\$20,000
\$70,000 - \$85,000	75%	\$10,500	\$15,000
\$85,000 - \$105,000	50%	\$7,000	\$10,000
Over \$105,000	Not Eligible	N/A	Not Eligible

Exceptions may be granted for extenuating circumstances.

While every easement and easement process may be different, there are some standard items that are necessary to have completed in order to put a property under easement with the Virginia Outdoors Foundation. This list contains some of the most common items and their associated cost. As every situation may vary, there may be additional items and costs to be considered. Use this list as a guide.

Examples of Estimated Easement Expenses

- Appraisal: \$4,500-\$6,500
- Legal Services: \$3,000-\$4,500
- Survey*: VOF will determine the need for a survey
- Title Work: \$500-\$750
- Lender’s Easement & Mortgage Review: \$2,500
- VOF Baseline Documentation Report (BDR) Fee: \$3,000-\$3,500
- Other Associated Costs Such as Perk Test, Tax Advice \$

*Include the cost of survey if it is known that one is needed. If VOF determines that a survey is needed, the award amount may be adjusted.

Estimated Expenses:

Estimate your total costs in the space provided below including all due diligence items associated with placing your property under easement. Discuss the price of the BDR preparation fee with your VOF Easement Project Manager. Please note that if VOF determines that a survey is necessary, this expense will be included in the grant award. You may ask for additional funds if you provide written estimates.

Estimate expenses in the space provided below.

- Appraisal: \$ _____
- Legal Services: \$ _____
- Survey: \$ _____
- Title Work: \$ _____
- VOF BDR Fee (\$3,000-\$3,500) \$ _____
- Other (may not be eligible): _____ \$ _____
- Other (may not be eligible): _____ \$ _____
- TOTAL REQUEST:** \$ _____

Financial Need Information

Please use the space below or attach a separate note to describe any financial need factors that may not be revealed by the federal tax forms submitted. This could include changes in income or expenses or reasons why the easement may be more costly such as large acreages or a complicated legal description.

Additional Landowner Information

Please provide contact information for all owners*, entity (if applicable) and entity members (if applicable).

**Married couples are considered one owner*

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____

Email: _____

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____

Email: _____

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____

Email: _____

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____

Email: _____



AFFIDAVIT FOR NON-FILERS

Landowners who do not meet the IRS requirements for filing federal returns must complete and submit this affidavit to substantiate financial need.

Affidavit

Commonwealth of Virginia

County of _____

Before me, the undersigned Notary, _____ [name of Notary before whom affidavit is sworn], on this _____ [day of month] day of _____ [month], 20____, personally appeared _____ [name of affiant], known to me to be a credible person and of lawful age, who being by me first duly sworn, on [his _____ or her] oath, deposes and states as follows that:

1. _____ [name of applicant(s)] [has or have] made application to the Virginia Outdoors Foundation for open-space land preservation trust fund assistance pursuant to Virginia Code Section 10.1-1801.1 in order to convey an open-space easement to the Virginia Outdoors Foundation;
2. Such applicant(s) [has or have] insufficient income to have been required to file a federal or state income tax return for the years _____, _____ and _____; and
3. Such applicant(s) [has or have] a financial need for such assistance in order to make such conveyance of the open-space easement.

[signature of affiant]

[printed name of affiant]

Subscribed and sworn to before me, this _____ [day of month] day of _____ [month], 20____.

Notary Public

My commission expires: _____

(SEAL)

Registration No. _____