

# LANDOWNER QUESTIONNAIRE

## *conservation easements*

This form is to aid the Santa Fe Conservation Trust in tailoring your conservation easement to your land protection and financial planning goals. We hope you find it useful.

Today's date: \_\_\_\_\_ Landowner name(s): \_\_\_\_\_

Property name or description: \_\_\_\_\_

Property acreage: \_\_\_\_\_

*For each question, please check all that apply.*

### I. YOUR GOALS AS A LANDOWNER

a. What values are important to you in regard to your property?

- |  |   |
|--|---|
| <input type="checkbox"/> place to live   | <input type="checkbox"/> pass on to children                    |
| <input type="checkbox"/> place to visit  | <input type="checkbox"/> preserve natural landscape and setting |
| <input type="checkbox"/> financial asset | <input type="checkbox"/> other: _____                           |

b. How are you likely to use your property in the next 20 years?

- |   |   |
|---|---|
| <input type="checkbox"/> leave as is    | <input type="checkbox"/> give to children |
| <input type="checkbox"/> build house(s) | <input type="checkbox"/> other: _____     |
| <input type="checkbox"/> sell           |   |

c. Why are you considering a conservation easement?

- |   |   |
|---|---|
| <input type="checkbox"/> desire to keep land open | <input type="checkbox"/> desire to protect special land feature or wildlife |
| <input type="checkbox"/> tax deduction            | <input type="checkbox"/> avoid family conflicts about future uses           |
| <input type="checkbox"/> estate planning          | <input type="checkbox"/> other: _____                                       |

d. Which actions are consistent with your goals for the property?

- Create opportunities to enhance existing wildlife, scenic and/or agricultural resources as one of the primary uses of the property.
- Create strong conservation restrictions so that existing wildlife, scenic and/or agricultural resources are maintained and not diminished.
- Protect existing land resources but allow room for some development for children or others.
- Create restrictions to generally protect land resources and get tax deduction.

e. Are you uncertain about how you would like to use your property in the future (yes/no)? \_\_\_\_\_

**OFFICE USE ONLY** Property: \_\_\_\_\_ date: \_\_\_\_\_

**SANTA FE CONSERVATION TRUST**  
**SFCT.ORG**

**505.989.7019**

**P.O. BOX 23985, SANTA FE, NM 87502**

**INFO@SFCT.ORG**

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### 2. PROPERTY DESCRIPTION AND CONSERVATION VALUES

a. How many legal parcels does it consist of and what is the size of each parcel? \_\_\_\_\_

b. What qualities of the property are you most interested in protecting? \_\_\_\_\_

c. Which special features of the property are important to you to protect?

\_\_\_ Homestead/family history

\_\_\_ Topographical or geological

\_\_\_ Wildlife observation and resources

\_\_\_ Stream frontage, ponds, etc.

\_\_\_ Forestry or agricultural use

\_\_\_ Other: \_\_\_\_\_

d. Are there any benefits of adjoining lands that are especially important to you (e.g., protected open space, scenic vistas, special land features.)? If any, please briefly describe.  
\_\_\_\_\_  
\_\_\_\_\_

### 3. PROPERTY OWNERSHIP AND LAND DIVISION

a. Is the property owned jointly with other family members \_\_\_\_\_ or non-family partners \_\_\_\_\_? If so, is each name listed on the deed of ownership? \_\_\_\_\_

b. How many years have you or your family owned the property? \_\_\_\_\_

c. Has/have the owner(s) of record changed during that period (e.g., from a couple to an individual, partnership or trust?) \_\_\_\_\_

d. Do you contemplate changing ownership in the future? \_\_\_\_\_ If yes, why and in what way? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

e. Is your property divided (e.g., multiple lots, subdivision, etc.)? \_\_\_\_\_ If so, please briefly describe. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

f. Do you contemplate dividing your property? \_\_\_\_\_

g. Is your property encumbered with any of the following?

\_\_\_ Covenants

\_\_\_ Other easements of record

\_\_\_ Deed restrictions

\_\_\_ Current use

\_\_\_ Road easements

\_\_\_ other: \_\_\_\_\_

\_\_\_ Utility easements

h. Is the property that you are interested in protecting part of a larger adjacent property holding? \_\_\_\_\_

i. Do you own other land elsewhere in northern New Mexico? \_\_\_\_\_ If so, please describe briefly. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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### 4. CURRENT AND FUTURE USE OF PROPERTY

a. Do you now or plan in the future to use your property for any of the following?

- agriculture
- home-occupancy business
- commercial/industrial use
- long-term leasing

b. Do you now or plan in the future to manipulate your property in any of the following ways?

- wetland enhancement or pond creation
- watercourse channeling
- topographical grading
- road building
- trail building
- fishery or wildlife habitat enhancement
- tree or vegetation clearing
- mining or graveling
- creating landing pad or airstrip
- tilling for cultivation

c. Do you now or plan in the future to use your property for any of the following recreational activities?

- walking
- skiing
- horseback riding
- photography
- snow machining
- fishing
- commercial recreation
- large group tours
- hunting

### 5. BUILDING

a. Briefly list the number and approximate size of existing building(s)

Principal residences: \_\_\_\_\_ Guest houses: \_\_\_\_\_

Non-residential buildings (e.g., detached garages and barns) \_\_\_\_\_

Ancillary structures (e.g., tennis courts, swimming pools, outdoor gazebos, barbecue facilities, etc.) \_\_\_\_\_

b. Please briefly describe your future building plans, if any: \_\_\_\_\_

### 6. MISCELLANEOUS

a. How useful was this questionnaire in working through or summarizing your thoughts regarding current and future planning for your property? \_\_\_\_\_

b. Please add any additional comments about your property that you wish to share with us. Thank you for your time and interest in completing this questionnaire. \_\_\_\_\_