

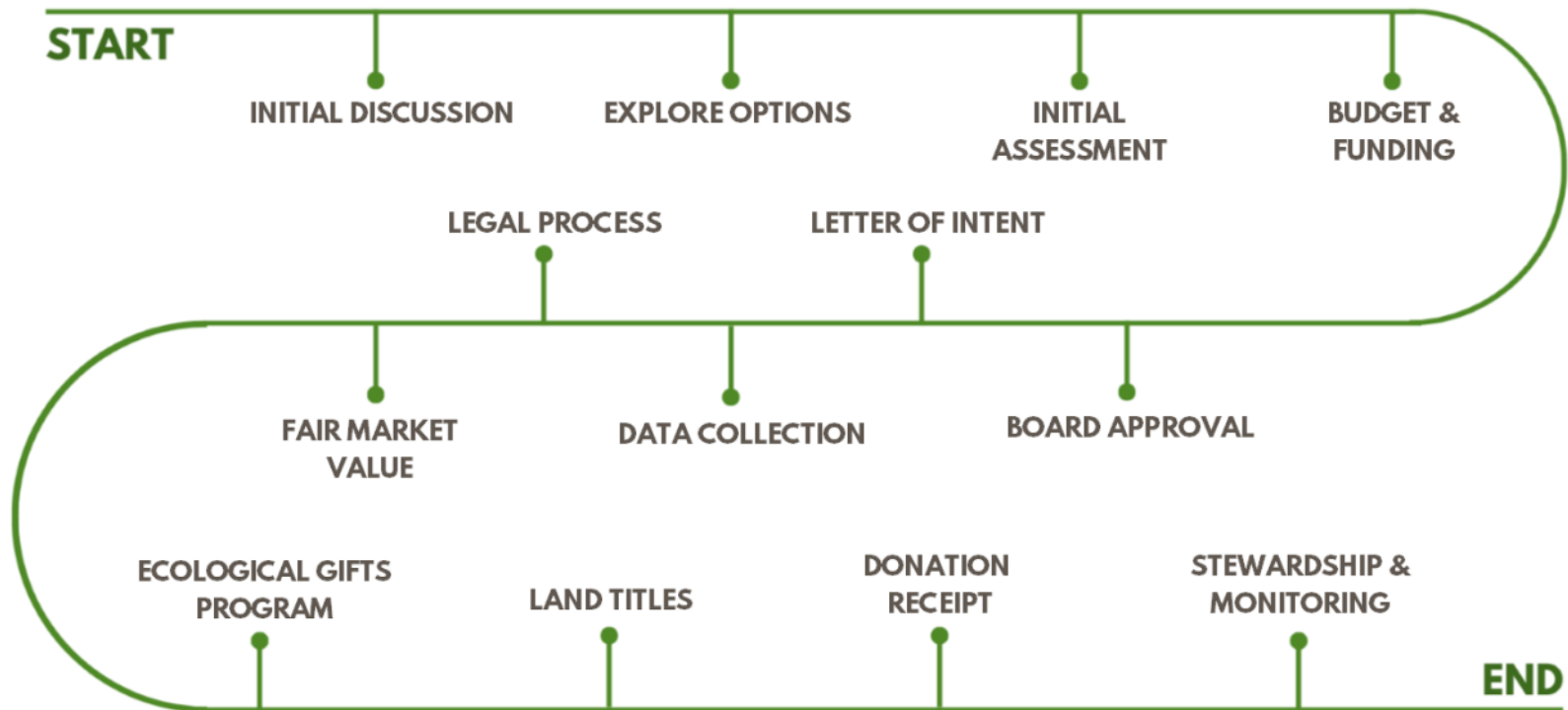


PLANNING YOUR CONSERVATION LEGACY



CONSERVE YOUR LAND WITH US

This guide takes you through the steps of planning your conservation legacy with the Edmonton and Area Land Trust (EALT). We are a registered environmental charity and are eligible to receive ecological gifts such as land donations and conservation easements. We monitor and steward the lands in our care, safeguarding their ecological and other values in perpetuity. By conserving your land with us, you can have peace of mind knowing the land you love will be protected forever.





STEP 1: INITIAL DISCUSSION

We begin the process by learning more about your wishes for your land. Think about your land 10, 50, and 100 years from now—what do you want protected, and what makes sense for you, your family, and your financial and estate planning?



1. What are your short and long-term wishes for your land?
2. Does your family share your wishes for the land?
3. What natural or other features do you want to protect?
4. What land uses, activities, or development do you want to allow?
5. What are your financial and tax needs?
6. What are the needs of potential future owners of the land?

OUR PRIORITIES

We will consider how your land and your goals fit with our priorities for land conservation in Edmonton and area. We focus on lands that support biodiversity, habitat connectivity, and ecosystems. We also conserve lands that, in addition to ecological value, have high social, cultural, agricultural, or recreational value.



LOCATION

- Is your land in the city of Edmonton or within 150 km?
- Is your land in a high priority area identified in our Regional Conservation Plan?
- Is your land accessible by road?
- What developments in the area may impact the land?

ECOLOGICAL VALUE

- Is your land close to other ecologically important lands and does it contribute to habitat connectivity?
- Does your land have forested areas, native grasslands, wetlands, lakes, rivers, or streams?
- What wildlife are found on your land? Are there any Species at Risk or keystone species?

OTHER VALUES

- Does your property have prime agricultural land or contribute to urban agriculture?
- What recreational activities take place on the land?
- Does your land have Indigenous or other cultural or community value?



STEP 2: EXPLORE OPTIONS

There are a number of tools available to you as a private landowner interested in conserving your land. We will go over options with you and recommend that you seek professional legal, estate planning, and financial advice before deciding a course of action.



LAND DONATION



CONSERVATION EASEMENT



ECOLOGICAL GIFTS PROGRAM

LAND DONATION

There are various ways you can donate your land to EALT. Making a gift of property does not mean your connection to the land has to end. We will work with you on a donation agreement that meet your needs and ours.

1.

Fee-Simple Donation. You can donate all or part of your land and EALT becomes the landowner and is responsible for the land as soon as the title transfers.

2.

Life Estate. You can donate all or part of your property and continue to enjoy, live on, or work the land for a specified period of time or the remainder of your life.

3.

Bequest. You can arrange a future donation of all or part of your property as a bequest in your will.



CONSERVATION EASEMENT

A conservation easement is an option when you want to continue to own your land, sell it, or pass on to heirs. You can think of owning your land as a bundle of rights. By registering a conservation easement on title, you are gifting some of those rights to EALT in order to permanently protect the forests, wetlands, or farmlands you love. We will work with you to determine what activities to limit or restrict—these restrictions help conserve those features you value with all future landowners also being subject to the terms of the conservation easement.

ECOLOGICAL GIFTS PROGRAM

This federal program provides private landowners like you with tax incentives to conserve ecologically sensitive land. For your land to be eligible it must meet provincial and national criteria and should have a high percentage of native or uncultivated vegetation, riparian areas or wetlands, or other significant natural features. Certified ecogifts receive preferential tax treatment that is superior to most other charitable gifts, and the benefits can be carried forward for 10 years.





STEP 3: INITIAL ASSESSMENT

We will learn a lot about your land from our initial discussions. We will continue to gather additional information through conversations with you, desktop research, and a possible site visit.



YOUR KNOWLEDGE

Your knowledge of your land over time and through the seasons will help us get a sense of the conservation and other values of your land. We will ask you to share your observations, as well as information you may have had over the years from foresters, biologists, archeologists, or others about your land.

DESKTOP RESEARCH

Aerial imagery will give us a bird's eye view of your land and its natural features and surroundings. You can help by sharing maps, surveys, reports, or other documents you have about your land. We will also review the title to verify the current owner(s) and learn of any caveats, liens, or registered interests.

SITE VISIT

We may ask for a site visit, typically in spring, summer, or fall. It is helpful if you can be there to show us around and point out key features, as well as issues such as trespassing or invasive plants.



STEP 4: BUDGET & FUNDING

The next step is to map out costs and potential funding to cover legal fees, appraisals, and staff time to assess and inventory your land and coordinate the potential donation or easement. We also determine annual monitoring and stewardship costs, and overall feasibility for EALT.



GRANTS



LANDOWNER CONTRIBUTIONS



FUNDRAISING

GRANTS

Grants help us undertake our securement and stewardship work. The main source of funds for land securement is the Alberta Land Trust Grant Program. This program helps cover up-front costs for securement including staff time, legal fees, appraisal fees, travel, and supplies. It also seeds an endowment fund, however additional contributions are typically needed to truly provide predictable, stable annual funds for stewardship. If your land is eligible, we will submit a grant application in the fall and await the results in the first quarter of the following year.

LANDOWNER CONTRIBUTIONS

We encourage landowners to consider donating to help with the costs of securement and stewardship. This could be a restricted donation for specific purposes (e.g., legal or appraisal fees) or setting up or contributing to an endowment fund for the land. Other options include unrestricted donations, securities, or mutual funds, and gifts in wills. All donations, large and small, are greatly appreciated.

FUNDRAISING

Each land securement is unique and in some situations we may seek to raise the necessary funds through online fundraising campaigns or other initiatives.



STEP 5: BOARD APPROVAL

If your land meets our four main criteria—location, ecological and other values, management needs, and funding—we will present the securement opportunity to EALT’s Board of Directors. If approved, we will continue along the securement process with you.



An aerial photograph of a rural property. In the foreground, there is a large, dense forest. To the right, a large, curved field of corn is visible. In the center, there is a house with a brown roof and a circular structure with a yellow roof. A paved driveway leads to the house. In the background, a small town or village is visible, followed by a large body of water and a golf course. The sky is clear and blue.

STEP 6: LETTER OF INTENT

This steps summarizes our discussion so far, and puts into writing the general terms of the land donation or conservation easement. It help solidify and clarify our mutual conservation goals and intentions, and is a valuable resource for grant applications and to initiate the legal process.





STEP 7: DATA COLLECTION

We will conduct field work on your land to prepare a Baseline Documentation Report that describes the flora and fauna, landscape and development features, and current uses of your land. You can think of the report as a snapshot of your land at the time of securement.



FIELD WORK

It typically takes one to three visits in the summer months to complete field work for the baseline report. For a conservation easement, we do this work before the easement is registered on title. For a land donation, we can do the work before or after title transfer. You will receive a copy of the baseline report to review and sign.

MONITORING

The baseline report is referenced in the land donation or conservation easement agreement and is used as the basis for monitoring the conservation values of your land.

REPORTING

If your land goes through the Ecological Gifts Program, we will submit a copy of the baseline report to Environment and Climate Change Canada.



STEP 8: LEGAL PROCESS

EALT will engage a lawyer to prepare the legal agreement, tailored to the principles and terms in the Letter of Intent. We encourage you to review the agreement with your lawyer. Once the agreement is finalized, you and EALT sign, and you will receive a copy for your files.



CONSERVATION EASEMENT AGREEMENT

There are several definitions, articles, and schedules in a Conservation Easement Agreement. One important schedule is the Restrictions and Property Management Principles. It describes what is and isn't allowed on the land—these are the rights that you are granting to EALT. For example, to protect native habitat on your land, you may restrict removing trees, altering wetlands, cultivation, excavation, and subdivision.

DONATION AGREEMENT

This is a legal document that outlines the terms and conditions in which a property is gifted to EALT. It includes mutually agreed upon Property Management Principles that will guide EALT stewardship of the land you are entrusting to us.



STEP 9: FAIR MARKET VALUE

EALT will hire an independent, professional appraiser to estimate the fair market value of your donation of land or conservation easement. EALT needs the appraisal to issue you a tax receipt. It is also needed if you are applying to the Ecological Gifts Program.



Determining the fair market value of your donation is the job of a professional appraiser, experienced with preparing appraisals for ecological gifts.

For a land donation, the appraiser estimates the fair market value of your land at the time of securement. For a conservation easement, the appraiser estimates the fair market value of your land now, and its estimated value with the easement in place. The difference is the value of the conservation easement.

The appraiser may contact you for a site visit or for further information or clarification. Once the appraisal is complete, we will provide you with a copy.



STEP 10: ECOLOGICAL GIFTS PROGRAM

Donating your land through the federal Ecological Gifts Program (EcoGifts) provides you with significant tax benefits—we encourage you to speak with your financial and tax advisors. If your land is eligible for this program, EALT will assist you in applying.



Your application can begin while we are working on the details of your conservation easement or land donation. If the timing of your donation is important for realizing tax benefits in a specific year, let us know and discuss this need with your lawyer, financial, and tax advisors.

You will receive key documents throughout the certification process:

- 1. Certificate of Ecological Sensitivity** from Environment and Climate Change Canada.
- 2. Notice of Determination of Fair Market Value** from the Ecogift appraisal review board.
- 3. Statement of Fair Market Value** from Environment and Climate Change Canada.

STEP 11: LAND TITLES

We're now ready to register the conservation easement or transfer of land ownership at the Land Titles office. For an easement, we will submit a Notice to Register, and after a 60-day waiting period is waived or expires, we will complete the registration.





STEP 12: DONATION RECEIPT

EALT will issue you a tax receipt for the fair market value of your donation, as determined by a professional appraiser. We encourage you to speak with your financial advisor so you can make the most of tax benefits available to you.





STEP 13: STEWARDSHIP & MONITORING

This last step is just the beginning. It is also the most involved because it is ongoing monitoring and stewardship that ensures that the conservation values of your land are maintained forever.



CONSERVATION EASEMENT

As a landowner with a conservation easement now on title you continue to enjoy and use your land, subject to the principles and uses in the easement. We will stay in regular contact and will schedule a monitoring visit once a year. At these visits, we will review the easement, compare the current state of your land against the Baseline Documentation Report, and discuss any questions or concerns. We encourage you contact us anytime if you want to confirm a particular use or activity.

LAND DONATION

Once the donation is complete, EALT becomes the landowner and is responsible for caring for the land you entrusted to us. We will develop a Conservation Management Plan that outlines the management goals for the property and objectives related to habitat, access, infrastructure, recreation, and monitoring. We will identify short and long-term priorities, and undertake non-critical work as funding allows.

CONTACT US

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PHOTOS

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