PRESERVATION EASEMENT DONATION PROCESS CHECKLIST

Property Name: __________________________________________________________
Street Address: ___________________________________________________________
City: _____________________________ County: __________________ State: ________
Tax ID Number: ___________________________
Legal Description (USS, ASLS, Lot, Block, etc.):
____________________________________________________________________
____________________________________________________________________
Easement Grantor: ________________________________________________________
Telephone: _____________________________     Email: __________________________

DONATION

1. Application   DATE RECEIVED:____________________________
   □ Owner information
   □ Statement of Encumbrances
   □ Description of architectural and/or historic significance
   □ Photos of all elevations and significant details
   □ Written description of property condition
   □ Renovation plans, if any
   □ Zoning information/development in surrounding neighborhood
   □ Description of threats to property
   □ Appraisal
   □ Application fee and AAHP Membership

2. STAFF REPORT
   □ Staff evaluation indicates property has potential to meet acceptance criteria.
   □ Staff report complete.

3. EASEMENT DONATION REVIEW
   □ Acceptance of easement donation by AAHP Easement Committee. Date: _____________

4. BOARD APPROVAL
   □ Easement donation accepted by AAHP Board of Directors or Executive Committee.
     Date: _____________________
PREPARATION FOR RECORDING

5. FEES
   □ Staff has clarified all fees and fee structure with Grantor. Date: ______________

6. BASELINE DOCUMENTATION
   □ B&W photos and color slides as specified in AAHP Easement Procedures.
   □ Site plan sketch or plat map.
   □ Detailed written description of building and its condition, including systems and materials checklist.
   □ Additional historic or architectural info (SHPO, property tax data, tax photo).
   □ Documentation of development plans which will impact property.
   □ Detailed description of other conservation or cultural values, if associated.

7. EASEMENT DOCUMENT PREPARATION
   □ Proposed easement document sent to grantor.
   □ Easement document approved by grantor.
   OR
   □ Grantor’s and Easement Committee’s attorneys complete document negotiations.

8. MORTGAGE SUBORDINATION
   □ Subordination Agreement(s) signed by mortgage holder(s) provided by grantor.

9. TAX BENEFIT
   □ Grantor has provided an appraisal that documents the before and after valuation of the easement.
   □ Staff has reviewed the appraisal and has considered signing IRS Form 8283.

10. FEES PAID TO AAHP
    □ Monitoring and legal defense fee.
    □ Baseline documentation fee.
    □ AAHP incurred legal fees associated with easement donation.
    □ AAHP incurred fees for the use of experts.
    □ AAHP incurred fees for the recordation of easement documents.

11. SIGNING
    □ Easement document signed by grantor and AAHP.
    □ Easement document notarized.

12. RECORDING
    □ Easement document and recording fee taken by AAHP staff to the County Recorder’s Office
       Date: ______________
    □ Recorded easement document received at AAHP office. Date: ______________