
PLANNING

**FOR THE FUTURE OF
YOUR LAND:**

**CONSERVATION-BASED
ESTATE PLANNING**

**A VIRTUAL WORKSHOP FOR
LANDOWNERS**

Thursday, April 23, 2026

6:30 – 8 p.m.



Welcome!

Glad you could join us this evening!

Planning for the Future of Your Land

An Introduction to Land Conservation and Estate Planning



Are you a Landowner with an interest in better management and conservation of your family lands but don't know where to start? Join our Zoom webinar series!

Webinars are free to attend. Registration required

Thursday
February 26
6:30-8 PM

Where to Start?

Setting goals for your land: conservation and/or stewardship. Problems for heirs if you don't plan, and how to start family conversations.

Thursday
March 26
6:30-8 PM

What You Can Do Right Now

Saving on property taxes, and available funding programs. How working with a forester can benefit you and your land.

Thursday
April 23
6:30-8 PM

Conservation-based Estate Planning

What makes your land special? Mechanics of a conservation transaction: finding the right legal tool and land trust partner.

Please register by emailing Cassidy@tlgv.org

Thank you to our co-sponsors:



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JOSHUA'S TRUST
EST. 1966

Companion Series to the brochure:

"Your Family Land – Legacy or Memory?"

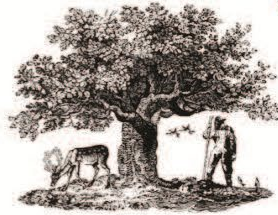
<https://thelastgreenvalley.org/wp-content/uploads/2024/04/FamilyLand2022Final2web.pdf>



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AGENDA

- **Welcome & Webinar Overview – Lois Bruinooge, Ex. Dir.,
The Last Green Valley**
 - **Conservation-based Estate Planning: Why Conserve & How? –
Amy Blaymore Paterson, Esq., Executive Director,
Connecticut Land Conservation Council**
 - **Brief Discussion – Lisa Hayden, Outreach Dir.,
New England Forestry Foundation (NEFF)**
 - **What Makes Your Land Special?**
 - **Pitfalls of Not Planning (Series recap)**
 - **Your Questions & Answers**
 - **Posted Resources – Wrap-up**
-

An aerial photograph of a rural landscape at dawn or dusk. A river flows through the scene, surrounded by lush green fields and dense forests. The air is filled with a soft, golden mist that partially obscures the distant hills, creating a serene and atmospheric scene.

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Planning for the
Future of your
Land

*Conservation-based Estate
Planning*

April 23, 2026

Agenda

- 1) About CLCC
- 2) Land Conservation in CT
- 3) Land Trusts
- 4) Why Conserve?
- 5) Conservation Options
- 6) Estate Planning Mechanisms
- 7) Financing
- 8) Tax Considerations
- 9) Putting the Deal Together
- 10) Due Diligence
- 11) Permanence
- 12) Case Study

Q&A

Caveat throughout...



Tom Ouellette

About CLCC

CLCC's mission is to elevate and strengthen land conservation in Connecticut.



CLCC's vision is a future where every Connecticut community is supported and sustained by a diverse mix of conserved land, and land conservation is embraced as an essential community value.

Land Conservation in Connecticut



Avalonia Land Conservancy

CT Green Plan:
21% by 2023

By whom?
How did we do?

Conservation Partners

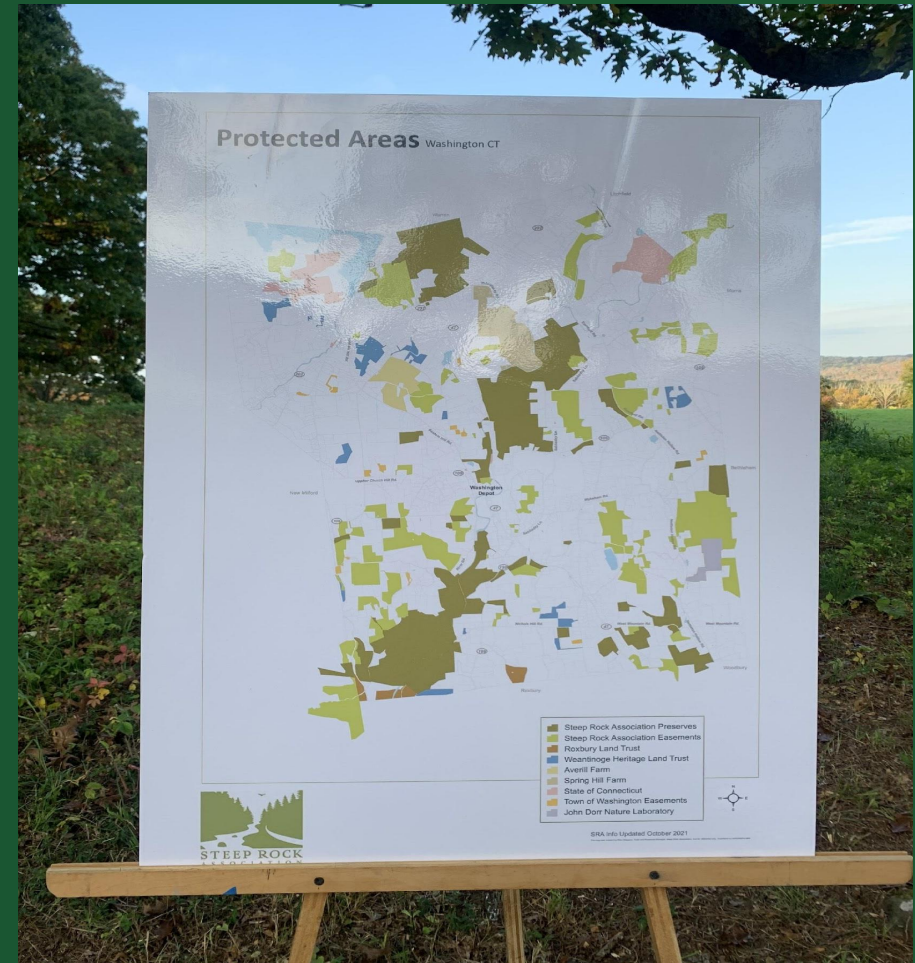
Land Trusts

Conservation Organizations

Municipalities

State & Federal Governments

Indigenous Tribes



Steep Rock Assn.

What Is A Land Trust?

A community-based, nonprofit organization that works with willing landowners to conserve land through fee simple ownership or conservation easements.

What Differentiates a Land Trust?

Created for the purpose of upholding their mission in perpetuity.

Perpetuity = Forever

Land Trusts in Connecticut

From 1/4-Acre Community Gardens to 1000-Acre Landscapes



Gather New Haven



NW CT Land Conservancy

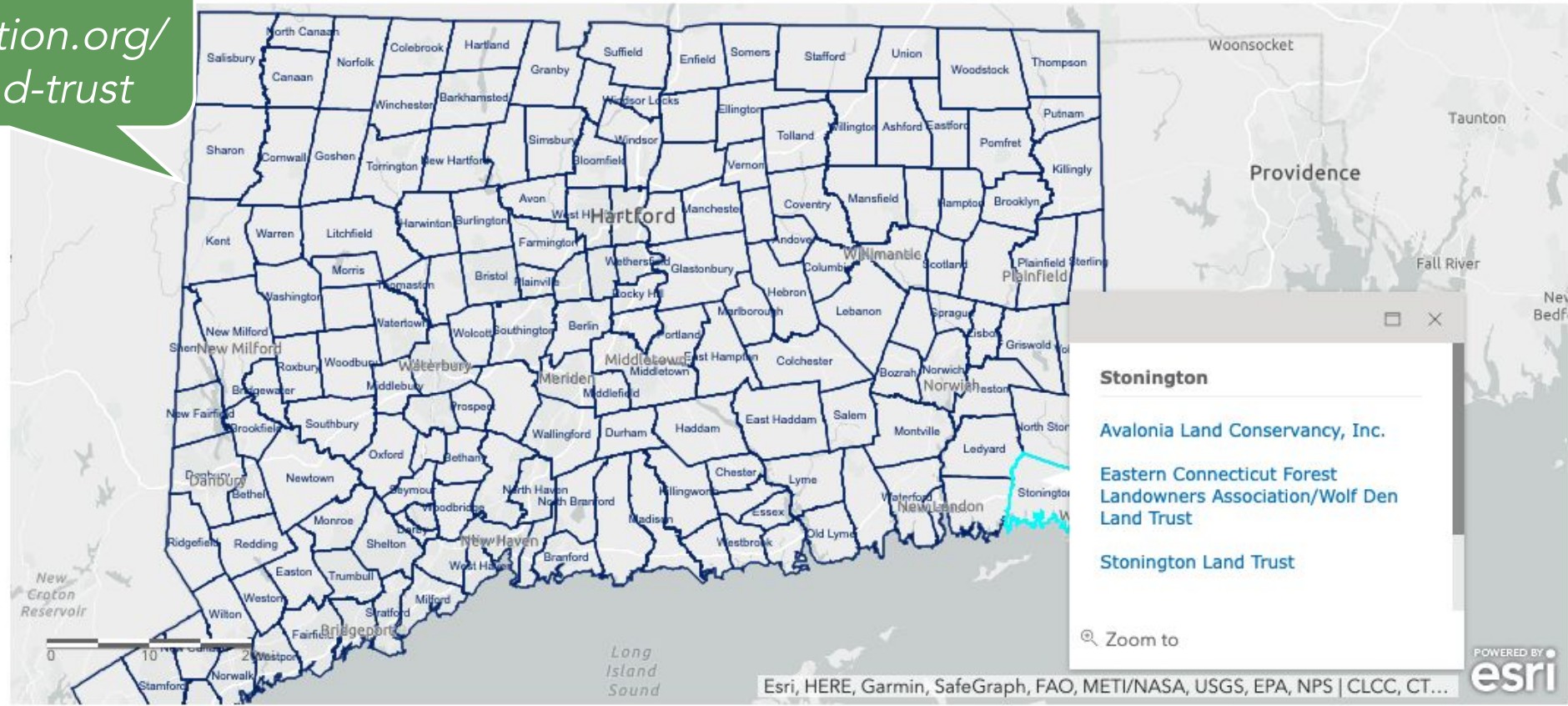
FIND A LAND TRUST

Use our list search below to find local and regional land trusts, and regional conservation partnerships across the state.

What is a Land Trust? >>

Download the map as a PDF >>

Visit
[ctconservation.org/
find-a-land-trust](https://ctconservation.org/find-a-land-trust)



Why Conserve?

What does your land mean to you?

What about your land makes you want to conserve it?

Why Conserve?

Economic Benefits

- Outdoor recreation
- Farming and forestry
- Tourism

Financial Benefits

- Cost of community services
- Reduce Property Taxes
- Increase Property Values

Community Benefits

- Clean water and air
- Mitigated impacts of climate change
- Conserved community character

Ecological Benefits

- Protected habitats
- Sustained biodiversity

And More...

What does your land mean to you?



Conservation Option 1

Fee Simple Transaction

A transfer of all right, title, and interest in land to a person or their heirs and assigns, forever.

You don't own the land anymore

Conservation Option 2

Conservation Easement

An agreement between the Easement Holder (land trust) and a Landowner, which specifies certain rights transferred to the Easement Holder and certain other rights that remain with the Landowner.

Voluntary, legally binding, and runs with the land

Conservation Option 2

Conservation Easement

Landowner Rights

Develop and/or Subdivide

Create/Maintain Trails

Hunt/Fish

Cut Firewood

Mine/Quarry

Farm

Exclude Others

Alter Hydrology/Topography

CE Holder Rights

Develop and/or Subdivide

Mine/Quarry

Alter Hydrology/Topography

Even More Restrictive:

Cut Firewood

Farm

Hunt/Fish

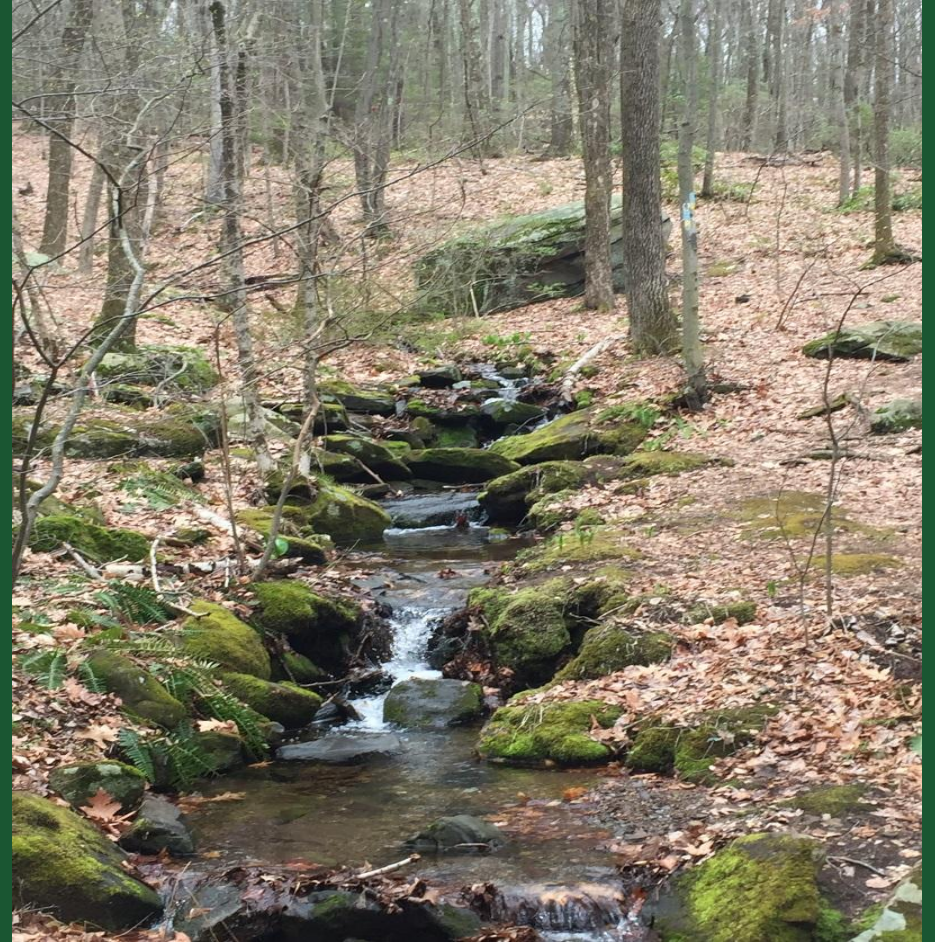
Create/Maintain Trails

Fee Simple vs. Conservation Easement

	Fee Simple Transfer	Conservation Easement
Who owns land after closing?	Land Trust	Landowner
Who manages the land after closing?	Land Trust	Landowner
Public access allowed?	Typically Yes	Typically No

Other Conservation Options

- Other Types of Easements
 - Agricultural
 - Forestry
 - Trail/Pedestrian
 - Forever Wild
- Restrictive Covenants
 - Unilateral
 - Deed



Estate Planning Mechanisms

- Wills
- Trusts
- LLCs and Partnerships
- Other Tools
 - Option to Purchase (trigger: buyer)
 - Right of First Refusal (trigger: seller)
 - Life Estate, Conveyance of Remainder Interest, etc.



Financing Conservation

- Donation
- Bargain Sale
- Fair Market Value Sale

- Others
 - Donation with Lifetime Income
 - Installment Sale
 - Buy, Protect, Sell



Tax Considerations

- Property Taxes
- Income Taxes
 - Charitable Deductions
 - Expanded Tax Incentive for CEs
- Capital Gains Taxes
- Estate Taxes
- PA 490

Consult your financial advisor



Putting a Deal Together

- Purchase & Sale Agreement
- Due Diligence
 - Title Search
 - Appraisal(s)
 - Environmental Assessment
- Survey
- Title Insurance
- Closing
- Baseline Doc. Report (CE)
- Management Plan (Fee)



Aspetuck Land Trust

Due Diligence

Land trust needs to know what they are getting, and landowner needs to know what they are giving:

1. Appraisal
2. Survey
3. Environmental Assessment (Phase 1, possibly 2 or 3)
4. Title Search & Insurance
5. Baseline Documentation Report (for CEs)
6. Stewardship Endowment & Legal Defense Fund

Due diligence takes time and money...

Ensuring Conservation Permanence

	Fee Ownership	Conservation Easement
Baseline Documentation Report		✓
Management Plan	✓	
Stewardship & Legal Defense Funds	✓	✓
Annual Monitoring	✓	✓
Enforcement	✓	✓

Case Study Valley Falls Farm

Valley Falls Farm - Vernon

- Fee Simple Ownership
 - Friends of Valley Falls
- Conservation Easement
 - State of CT (OSWA)
- Right of First Refusal
 - Town of Vernon
- Historic Preservation
- Multiple Structures



Summary: Steps to Conservation

1. Determine what it is you want to protect for future generations
2. Find a local or regional land trust to assist with realizing your land protection goals
3. Land trust reviews your land's conservation values in order to assist you in determining the best conservation options.
4. Speak with your legal and financial advisors
5. Work with land trust to draft an agreement and conduct the necessary due diligence
6. Close and celebrate!

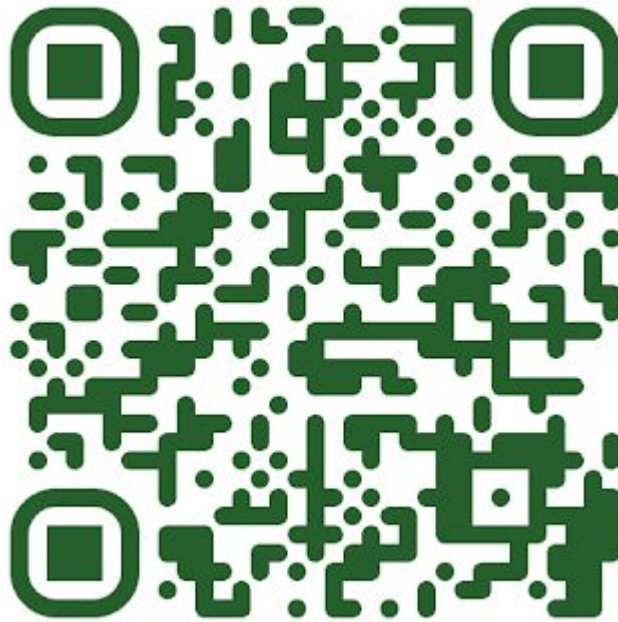
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Land Conservation Council

Protecting the Land
You Love



LAND CONSERVATION + YOU

Related Publications



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What is a Land Trust?

Land trusts are your local connection to conserving, exploring, and celebrating the land and special places you love...



LAND CONSERVATION + YOU + YOUR COMMUNITY

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Thank you!
Questions? Comments?

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