



Landowners' Options

Helping protect & restore
Iowa's land, water & wildlife

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Programs

Landowner's Options

Considering Iowa's special lands when dealing with real estate and estate planning



Mission



**The Iowa Natural Heritage
Foundation protects and restores
Iowa's land, water and wildlife**

IOWA'S DEMOGRAPHICS

- **97% of Iowa land privately owned**
- **Nearly 50% of land owned by those 65 yrs old or older**
- **20% of land will change hands in 5 yrs;
50% in 20 yrs**

Natural resource losses



Where are we headed...?



- Resilience to change
- Water & air quality
- Public health & wellness
- Attracting new residents
- Spiritual retreat
- Effects on other species

Valuable resources

Habitat for
wildlife



Clean Water



Places to Play




Scenic Beauty



Quality of life

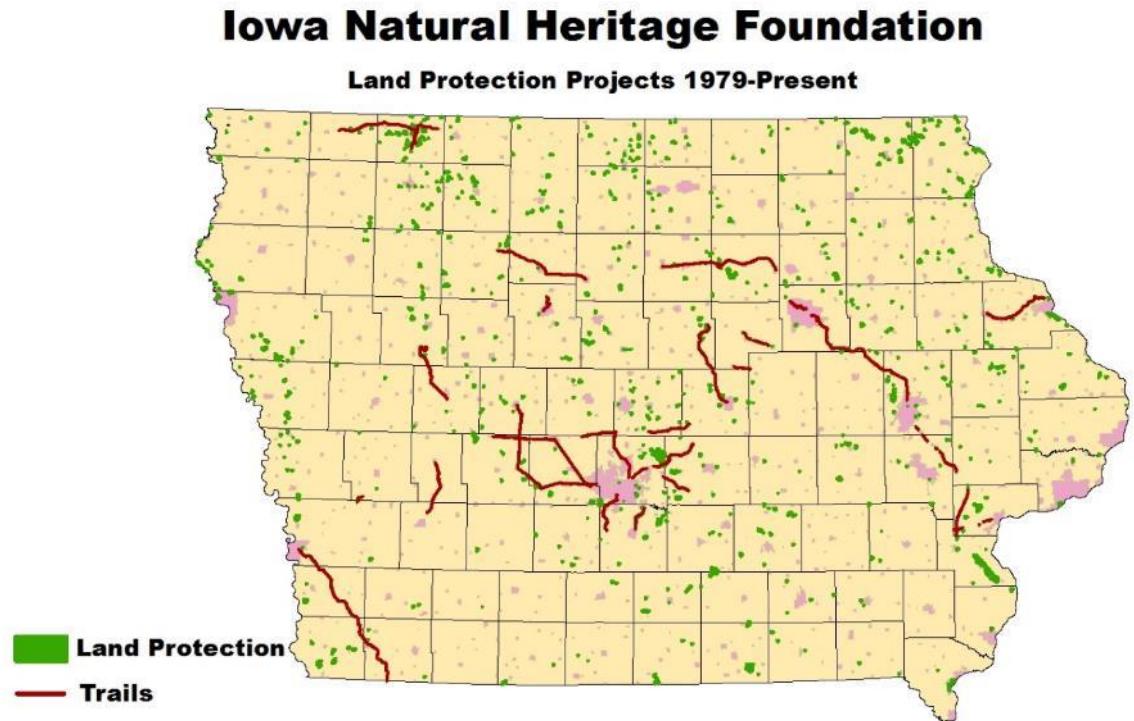


INHF Focus Areas...

- 
1. Permanent Land protection
 2. Restoration and Land Stewardship
 3. Public Policy and Advocacy

Land and trail projects

- Supported by members and donors
- 165,000 acres protected
- 97 counties
- Public Parks, Wildlife areas, rail-trails
- 170 Privately protected Conservation Easements
- 6,000 acres owned and managed by INHF
- Intern programs, Ackelson Fellow, Living Lands Fellowship, Ding Darling Scholarships



Land is more than an asset - a family legacy



Protecting land can...

- **Provide peace of mind to the landowner**
- **Provide charitable deductions**
- **Reduce estate taxes**
- **Provide needed income**

**Satisfying
and practical**



Why reach out?

- Land is at risk
- People don't know...
 - ...they can “shape the future” of their land
 - ...where to start
 - ...who can help



What kinds of land?

Where is it?

Adjacent to protected land
Conservation priority region
Key to water quality
Scenic byways

What's on it?

Quality

Potential?

Large or key location
Restorable



**Important to
the Landowner**

THE STARTING POINT CONSIDER...

- **Listening**
- **conservation goals**
- **the land's features and needs**
- **public use or private use**
- **family and community**
- **financial needs and tax benefits**

Why don't we reach out?

- **Don't know them well**
- **Know them too well**
- **“Future” sounds like “death”**
- **Might ask something we can't answer**
- **There's “no deadline”**

The landowner's viewpoint

- **Don't know their land is special**
- **Worried about the land's future**
- **No financial advisor or attorney**
- **No family or friend to help**
- **Overwhelmed by technical topic**
- **More comfortable than you are**



The landowner appreciates...

- You think their land is special
- You think taking action is important
- You can help – or can find help
- You offer *Peace of Mind*



Before you approach

- **Read the booklet**
- **Think of questions – not answers**
- **Be prepared to follow through**
 - Personally
 - Introduce



What to say...

- **Your land is important - why**
- **Have you thought about its future – keeping it special?**
- **Booklet might help**
- **Business card – questions, want to talk**
- **Information is free & confidential**

What not to say

- **“Let’s get an appraisal.”**
- **“Let’s meet with your attorney next week.”**
- **“I can’t wait to move my office into your house.”**
- **“I promise...”**
- **“No.”**

How to approach

- **BEST:** In person casual, brief
- Through a friend or relative
- by mail, with follow-up call

Visit #2:
Walk the land with
them (or use maps)



Please raise “the Land Question”

- Does your land have special features?
- Does its future concern you?



INHF can help

- **Strategize before contact**
- **Talk through options – with you or your landowner**
- **Assist transaction if needed**
- **More training**



Serving landowners and their advisors since 1979

We offer you and your clients:

- **Free service, information
– not pressure**
- **Introductions to potential partners
Iowa or out of state**
- **Help protect as appropriate**

Using *Landowner's Options*

➤ Intro

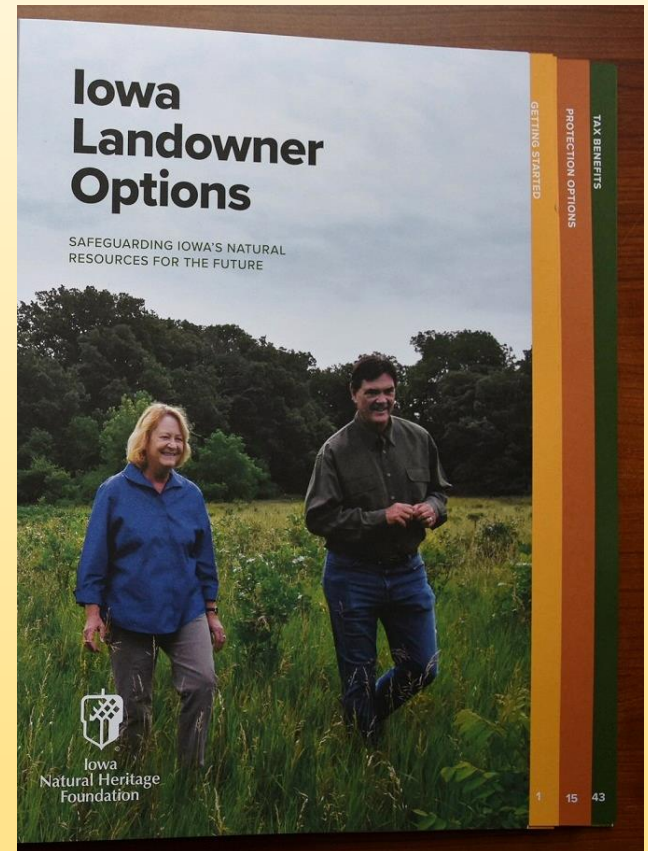
- Importance
- How to begin

➤ Main methods

- Donate
- Sell
- Keep

➤ Tax & financial info

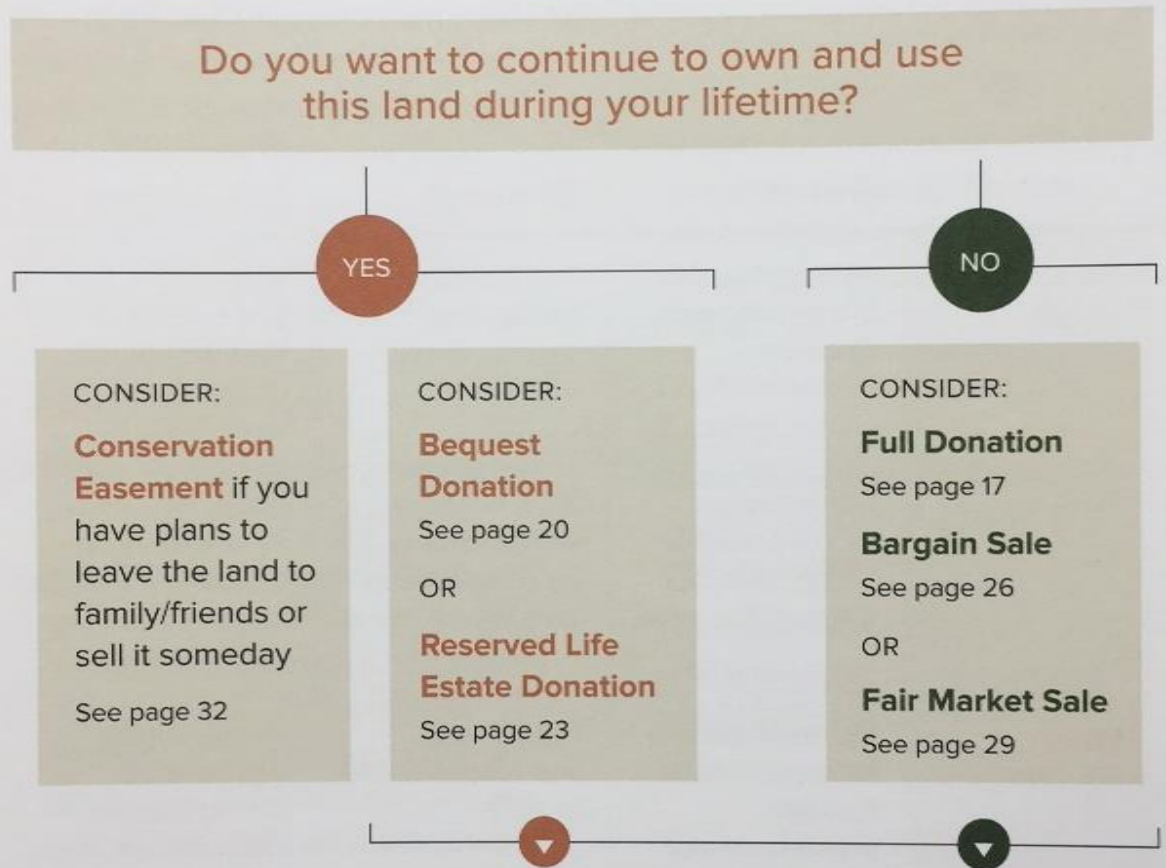
➤ Who can help



The decision process

Protection Options

When it comes to **conservation protection**, there are many options you can consider with your chosen conservation partner. Use the chart below to start identifying potential protection options.



These methods allow you to choose a conservation entity, such as INHF, to be the future owner of your land.

Story #1

- Older widow, no children
- Relies on income from the land
- Adjacent to public land

Bequest to public agency

Owner retains asset in case it's needed
Agency has no cost to acquire land

Story #2

- Family land, owner lives outside Iowa
- Does not rely on income from land
- Would like to see a family legacy (“give something back”)

Donation

Generous tax deduction

Family name stays on the land

Public enjoyment

Story #3

- Retiring couple
- Land is main asset. Cash is needed.

Bargain sale

Some cash, some deduction

Affordable for agency to purchase

Easier to secure grants

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Story #4

- Working farm with natural areas
- Heirs would like to farm it someday
- Development pressure approaching

Conservation easement

Land can stay in family

Reduces estate taxes

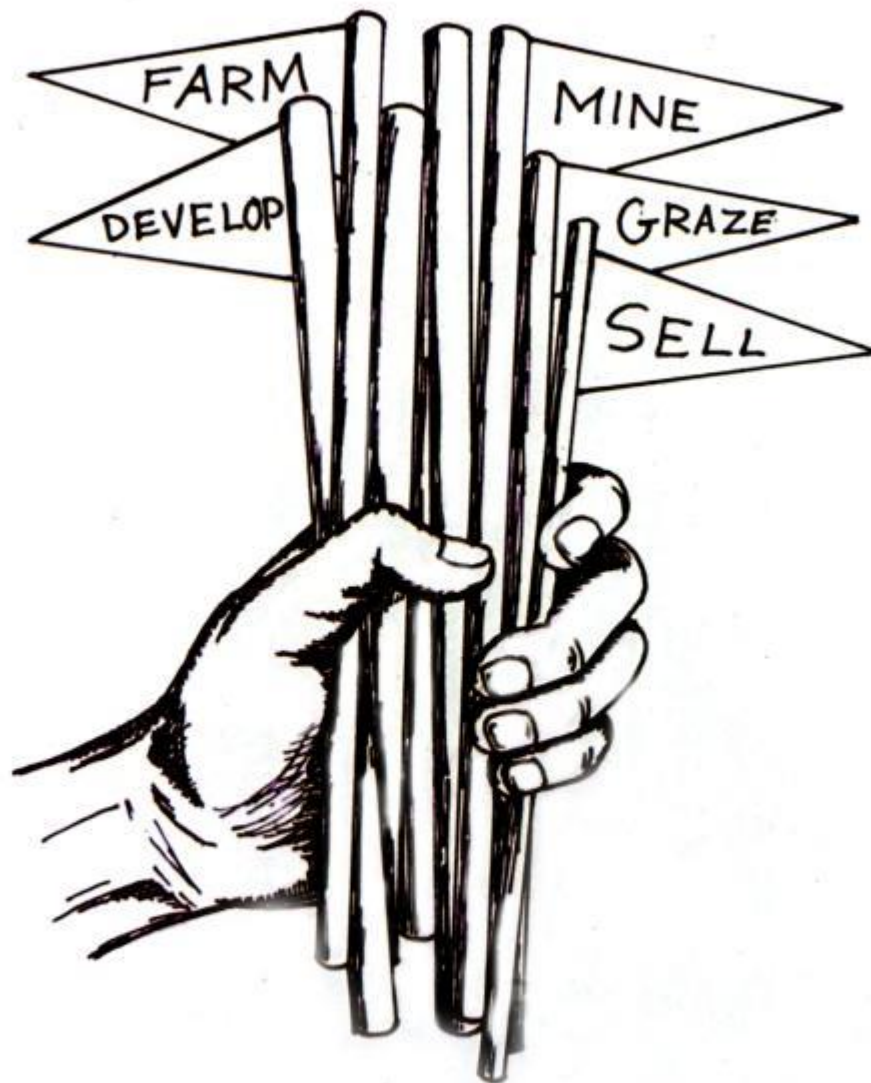
Conservation Easement

- A legal agreement between a landowner and a conservation organization (Chapter 457A)
- Permanent protection
- Specific to the land's needs
- Remains in private ownership.
No public access required (optional)

• **Chapter 457A – Who can hold Conservation Easements**

- **Department of Natural Resources,**
- **Soil and Water Conservation Districts as provided in chapter 161A,**
- **Department of Cultural Affairs, Historical Division**
- **State Archaeologist**
- **County Conservation Boards**
- **Any City or Agency of a city**
- **Private non-profit organizations**

... may acquire (conservation easements) by purchase, gift, contract, or other voluntary means, but not by eminent domain, conservation easements in land to preserve scenic beauty, wildlife habitat, riparian lands, wetlands, or forests; promote outdoor recreation, agriculture, soil or water conservation, or open space; or otherwise conserve for the benefit of the public the natural beauty, natural and cultural resources, and public recreation facilities of the state.



LAND RIGHTS

Conservation Easement

- Couple restores and works on land
- Land is undeveloped and valuable.
- Want to own or keep in family – with peace of mind

Charitable deduction
Afford to inherit
Agency Partner “Eyes
into the future”



Conservation Easement Value

- Appraise – with & without restrictions
- Difference in value =
Charitable income tax deduction
for landowner or estate
 - Iowa Income Tax Credit

Faulkes Heritage Woods

- **Multiple owners**
Complexity ahead!
- **Varying needs**
- **Want to**
“give back”

**Charitable
deduction
Simplify estate
Cash asset
Public asset**



Remember: *Big Picture*

➤ A variety of methods

- Not just selling at fair market value (FMV)
- Not just full donation

➤ “Protected”

...more than public land



➤ Different strokes for different folks

- Land needs and landowner needs vary

LAND PROTECTION PLANNING

- **Use a team of advisors**

attorney, tax advisor, trust officer,
conservation professional

- **Consider a combination of options**

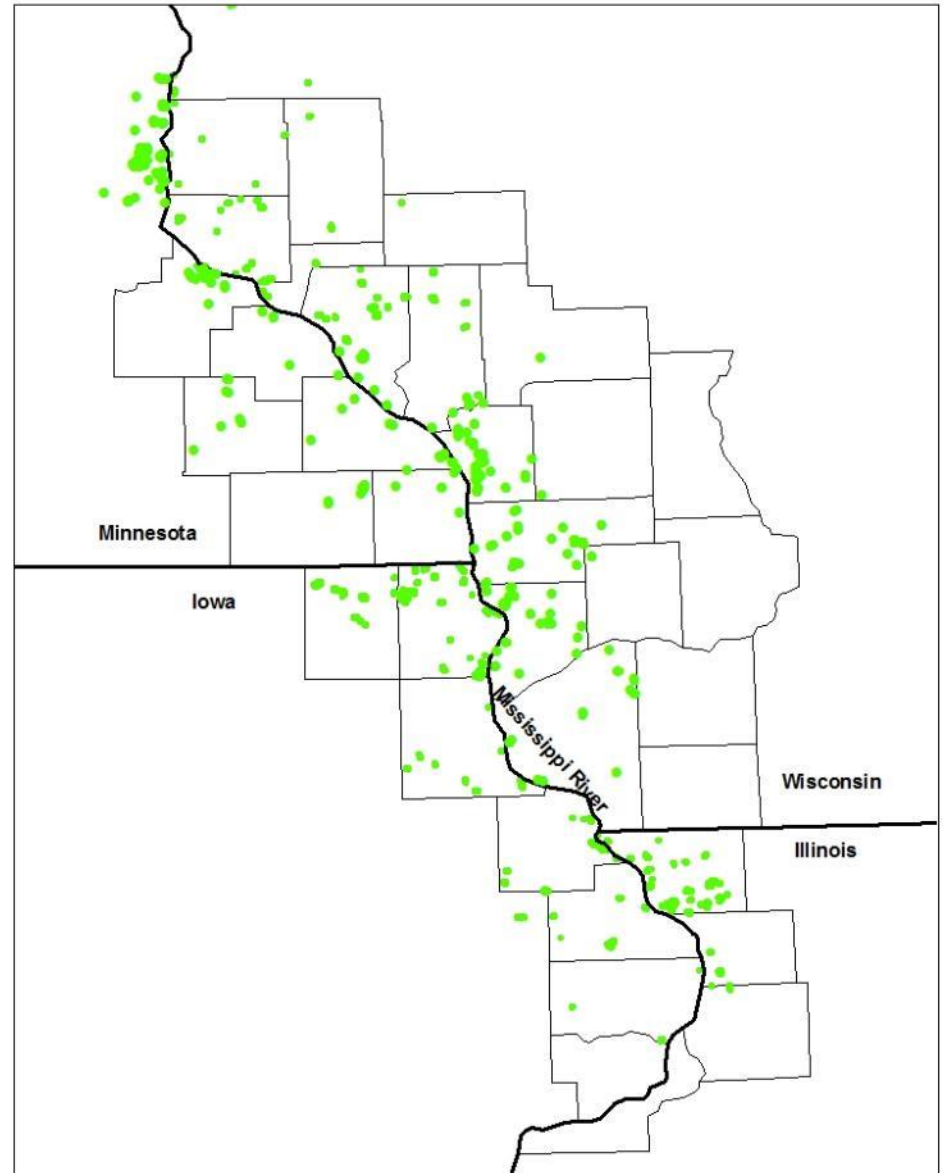
added protection of financial benefits

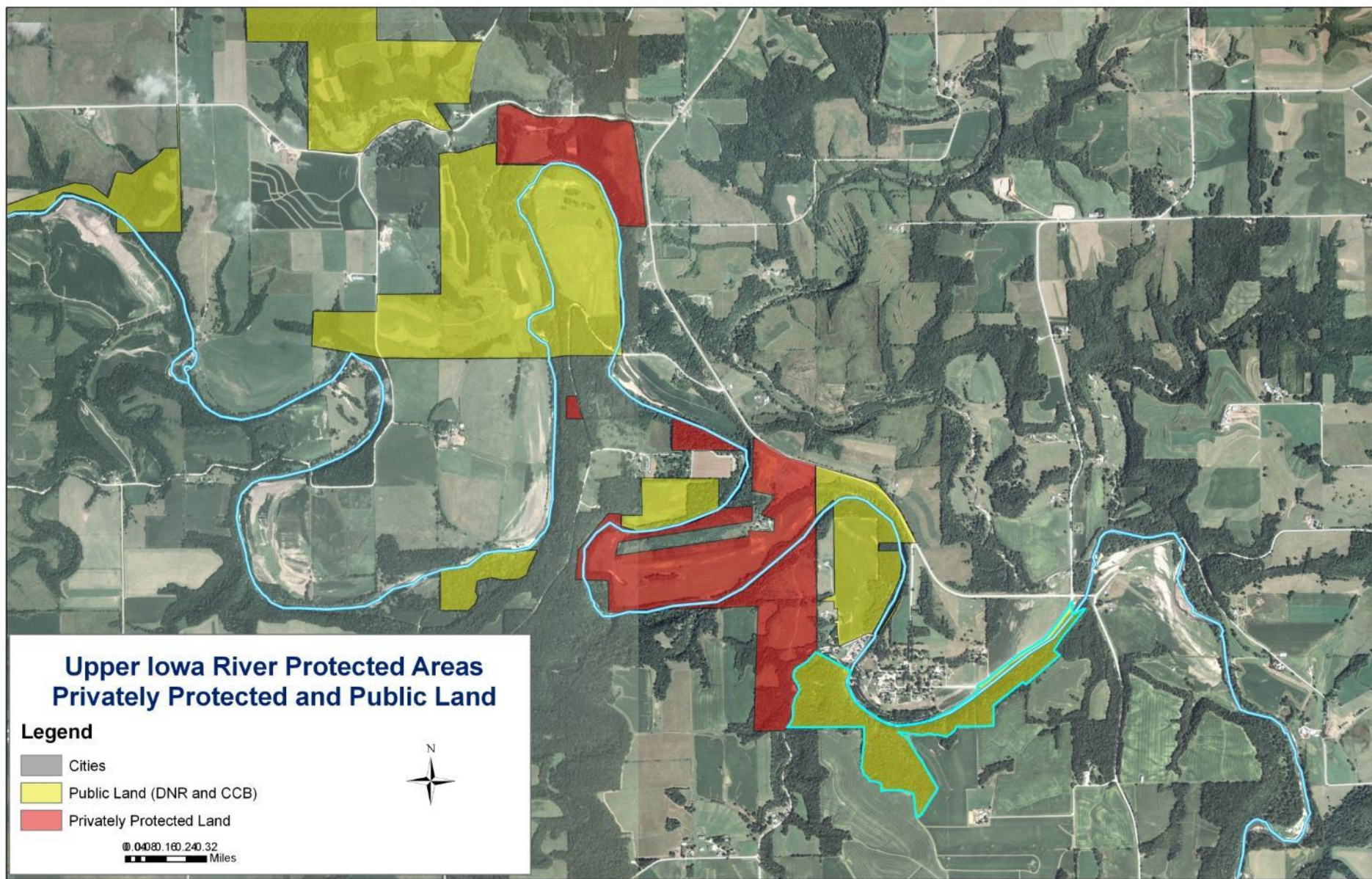
Landscape Scale Projects



- Define the need
- Create the vision
- Establish partners
- Look for funding options
- Get started

Blufflands Alliance Partner Projects 1994-2011





Landscape Scale Conservation Projects

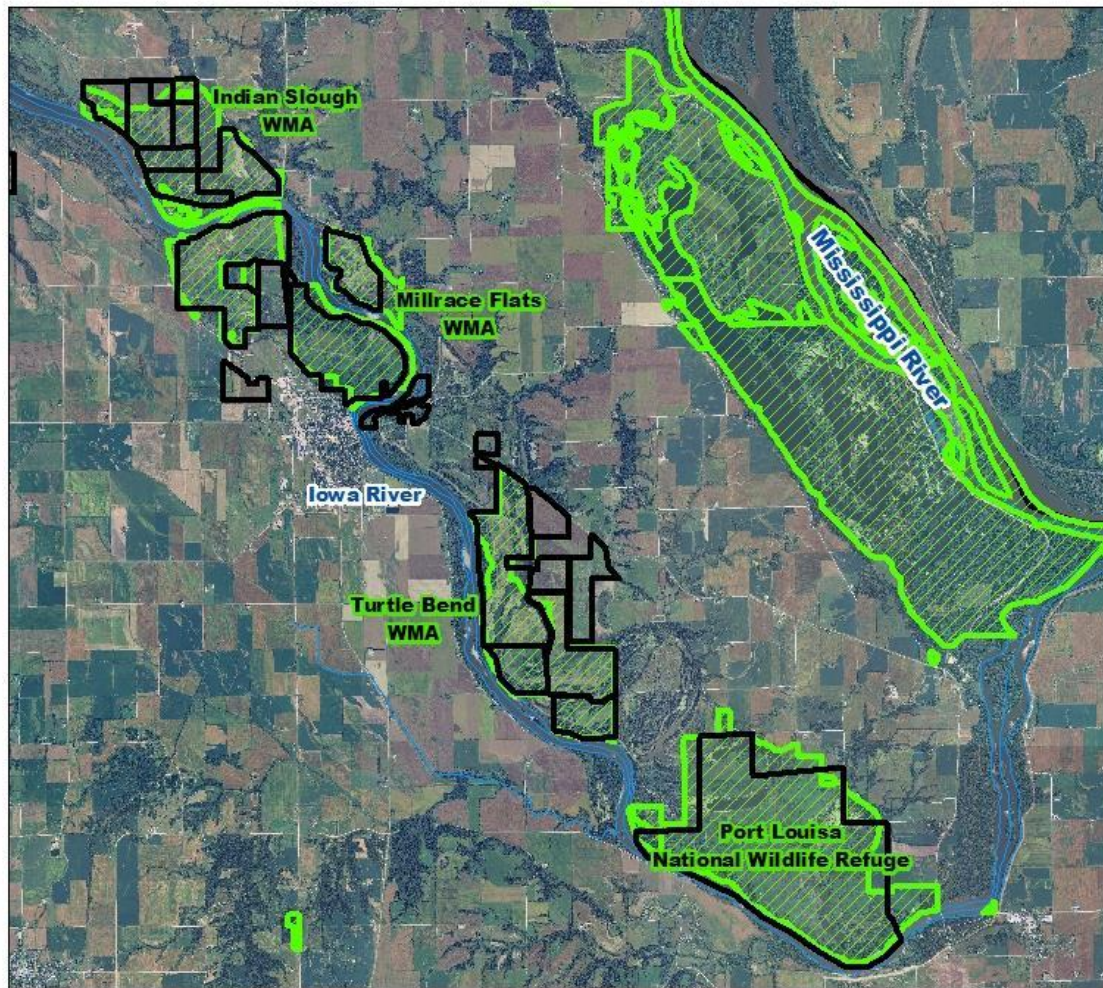


Loess Hills Special Landscape Area NPS Designation



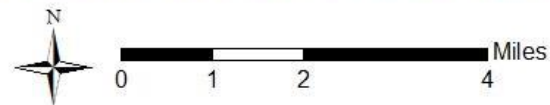
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Louisa County Mississippi River Watershed Protection

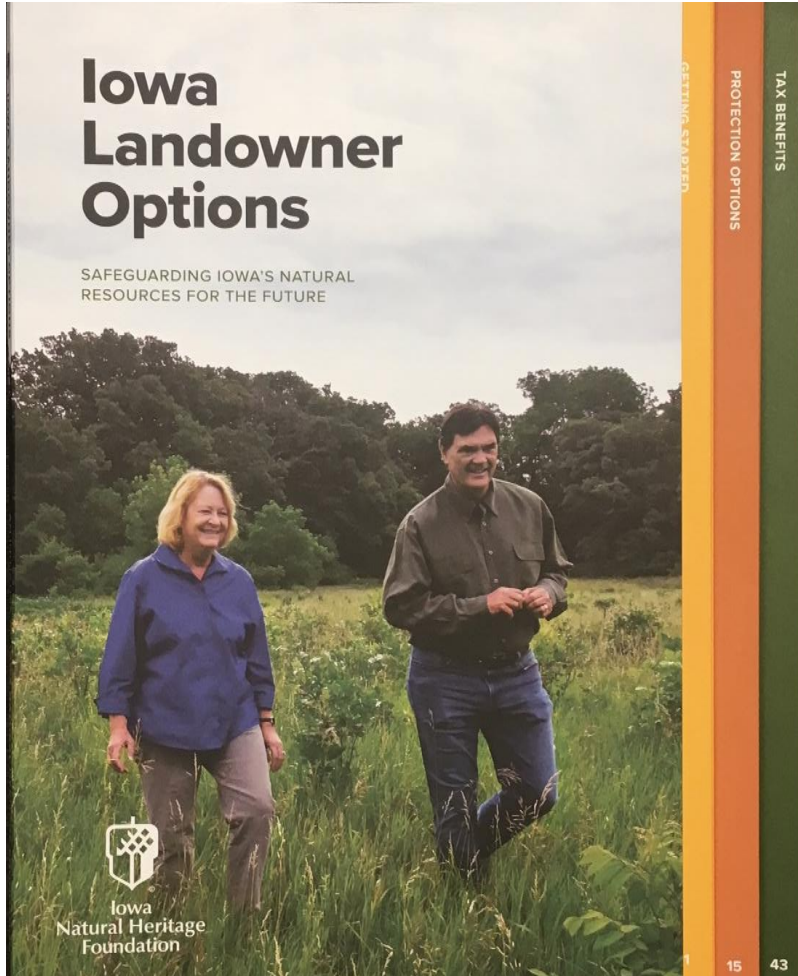


Legend

-  INHF Projects
-  Public Conservation Land



Booklets available



**On-line version
at
www.INHF.org**

**Call
800-475-1846**

Questions?



Thank you!



Iowa
Natural Heritage
Foundation

[www. INHF.org](http://www.INHF.org)

Thanks to

**REAP
Conservation
Education
Program**

