



Central Arizona Land Trust (CALT)

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Topics to be Covered



About Me
About CALT

Primary Tool to
Conserve Legacies

- Conservation Easements

About Me



Native Arizonan

A.S.U. B.S. in Biology

Wildlife Biologist

Law School (nonprofit envir atty)

Practiced Civil Litigation

Stopped Practicing Law

AZ Land & Water Trust

Got to Know AZ Farmers & Ranchers

Educated about Agriculture

AZDA

Own Company

Central AZ Land Trust (CALT)

- Founded in 1989
- Community-based, nationally accredited 501(c) (3) non-profit organization
- Mission: To preserve and protect open space, wildlife habitat, working agricultural lands, and the scenic and cultural values



The Primary Tool to Conserve Legacies: Conservation Easement (CE) Overview



Landowner Retains Ownership of Land

Sells/donates development rights (1 bundle sticks)

Purpose = conserve ag., open space by preventing from being subdivided

Governed by A.R.S. 33-271 and Deed of CE (recorded county located)

Deed of CE, contract with negotiable terms (can have an ag. structure, etc.)

The Primary Tool: Conservation Easement Overview



Amount of Sale or Donation Determined by a Qualified Appraisal

Appraiser – Looks at full sale value and then development rights (60-90%)

If Sells development rights = \$

If Donates = federal tax incentive

Funders are usually federal or state agencies and want these to be PERPETUAL (forever)

U.S. Dept. of Ag., Bureau of Land Mgmt, Forest Service, AGFD, ADOT, City Phx, etc.

The Primary Tool: Conservation Easement Overview



If perpetual, binding on whoever purchases the property and any heirs

When Sell Get Reduced Value (as got benefit upfront)

Deed of CE Between Landowner and Land Trust

Funder May Have Some Say re: Language Deed of CE

Land Trust is “holder” of CE

The Primary Tool:

Conservation Easement Overview



Land Trust Monitors Annually (with landowners permission)

Land Trust Legally Defends/Enforces CE

Land Trust Advocates for Landowner

Property remains in ag status (farm or ranch)

Property remains in ag production

Why CEs work for some landowners



- PROTECT LEGACY OF FARMING OR RANCHING
- FEDERAL TAX INCENTIVE AND DEDUCTION
- INFLUX OF CASH HELPS TO SUSTAIN THEIR AG OP
- ALLOWS THEM TO KEEP FARMING/RANCHING
- NECESSARY AG STRUCTURES NEGOTIATED INTO CONTRACT

Questions?

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