

## Easement Program: Application

### CHECKLIST of REQUIRED DOCUMENTS

v2014

I. The following items must be submitted to Pasadena Heritage in order for your easement request to be processed:

- Completed Application Form
- Application fee of \$100.00
- Evidence of National Register listing (see note below)
- Plans and specifications (if applicable)

*Note: If your property is individually listed on the National Register of Historic Places, a copy of the National Register notification stating the property and address and date listed on the Register should be submitted with the application. This is important information and required for you to receive a tax deduction.*

II. Please also provide the following items, which must be included with the easement document when it is recorded:

- Legal description and Preliminary Title Report**  
A legal description shall be attached to the easement as Exhibit A. The legal description should be a copy of (or exactly the same as) that used in the title report. A copy of the preliminary title report must also be submitted to Pasadena Heritage for verification.
- Photographs**  
Photographs of all exterior facades of the building, as well as any other structures or significant features to be covered by the easement shall be submitted with the application. The photographs shall be 35mm color prints and at least 3-1/2 x 5" in size. The prints will be attached to the easement document as Exhibit B and recorded as evidence of the building's appearance at the time of donation. The donor should keep a duplicate set of the photographs for his/her own records.
- Insurance Certificate**  
Please refer to Page 5 of the easement document. A certificate showing Pasadena Heritage as an "additional insured" is requested (and should be renewed each time you renew your insurance on the property).
- Appraisal Summary Form**  
The Internal Revenue Service requires the signature of Pasadena Heritage on Form 8283, the "Non-cash Charitable Contributions Appraisal Summary." This form is available from the IRS (or perhaps from your accountant). Please provide this form for our signature.

❑ **Endowment Contribution**

Your endowment contribution is due and payable before or at the time of signing. The easement will not be recorded until the contribution is received.

Following the signing of the easement, Pasadena Heritage will see that the easement document, including the legal description and photographs, are delivered to the Los Angeles County Recorder's Office where the easement will be recorded. The recording process normally takes a few weeks. Once recorded, the original copy of the easement will be returned to Pasadena Heritage. Upon receipt, a copy will be mailed to the donor.

Please contact Pasadena Heritage at 626-441-6333 should you have any questions about the materials to be provided or the easement process.