Boundaries and Easement Tasks:

___ Locate copies of existing surveys/ property descriptions.

___ Locate property corners and witness trees, and refresh existing markings.

___ Locate property boundaries and refresh existing markings.

___ If necessary, hire professional surveyor to do property survey.

___ Locate copies of all existing easements for property and record below.

___ Plan and execute needed easements to implement RMP.

*Property Survey Information:  (List all surveys done and where copies are located)

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

*Existing Easements (List all easements by purpose, location, parties involved, date executed and where copy is stored):

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

*Needed Easements (List all needed easements including purpose, location, parties involved and when they will be executed):

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

* Resources (List names and contact information for surveyors and other professionals contacted):

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
**Liability and Insurance Tasks:**

___ Post property boundaries

___ Post known hazards with warning signs

___ Meet with insurance agent and acquire necessary insurance

*Insurance Coverage for Forest Property/Family/Business (List type of coverage, carrier, amount and contact information for each policy):

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

**Land Use Tasks:**

___ Contact county Planning Department and determine land use category

___ Obtain copy of land use category description

___ Identify implications or constraints of land use category

*Land Use Category: ___________________________________

*Land Use Implications/Constraints:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

**Assessment Tasks:**

___ Contact Assessors Office and determine assessment category for property

___ Discuss assessment options with assessor and ensure you’re using the most beneficial option

* Assessment Category: ________________________________
**Property Tax Tasks:**

___ Verify current property tax status with county assessor

___ Select desired property tax status and make application with the county assessor

___ Record property tax status on cover sheet of RMP

* Property Tax Program: __________________________________________

**Income Tax Tasks:**

___ Contact a CPA and inquire about establishing a basis for your property.

___ Attach a copy of the basis calculation and utilization document you develop.

___ Contact a CPA or tax planner to determine how best to structure income and expense activities to minimize your tax burden.

**Other Taxes or Fees:**

___ Note fire prevention or other fees that get applied to your property

* Other Taxes and Fees Expected:
  __________________________________________
  __________________________________________
  __________________________________________

**Estate Planning Tasks:**

___ Determine property’s current form of ownership and its implications

___ Develop/update will and/or living trust

___ Schedule meeting of family/heirs to discuss future of property

___ Hire an estate planning team and create an estate plan (or update existing one)

* Form of Ownership & Implications:
  __________________________________________
  __________________________________________
  __________________________________________
*Estate Planning Information (List type of document and where copy is located):

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

*Estate Planning Contacts (List attorney, CPA, Financial Planner, Consulting Forester or others who are knowledgeable about your estate plan):

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
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________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

**Recordkeeping Tasks:**

___ Investigate various record-keeping systems and choose one for your property

___ Implement or update a record-keeping system

* Records Location: (List location of records for your forest property).

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________