

## **Advanced Tax Credit Seminar**

Hosted by the Mountain Waters RC&D and the Valley Conservation Council

9:30 – 10 am Registration

10 – 10:05 Welcome, review agenda for the day (Lindsey Holderfield)

10:05 – 10:30 Taylor Cole

- Overview of conservation easements
- Growth of easements in Virginia
- Introduction to Virginia tax credit program
- A tax credit broker's role in the easement process

10:30 – 11:15 George Barlow

- Drafting conservation easements
- Components of easement documents
- Easement language – how it is designed to protect conservation value?

11:15 – 11:45 Wesley Woods

- Conservation easement appraisal process
- What do professionals need to know about appraisals?
- IRS standards

11:45 – 12:05 Jeremy Stone, Department of Conservation and Recreation

- DCR new review criteria for large easement deals

12:05 – 12:45 LUNCH

12:45 – 1:45 Becky McCoy, CPA

- easements as a financial planning tool
- Federal tax deductions, state tax credits
- new tax code

1:45 – 2:15 Panel Q&A