



## Creating a **Conservation Legacy Agreement**

If you have property near to or abutting a Mass Audubon Sanctuary, a Conservation Legacy Agreement is an easy way to contribute to the long-term care of that sanctuary without having to make a financial commitment today.

### What it is and How it Works:

The Mass Audubon Conservation Legacy Agreement (CLA) program—unique in the state of Massachusetts—uses a transfer fee generated at the time of a future sale of the property to protect nature and support your neighboring sanctuary. It is a voluntary agreement in which a landowner provides that a small percentage of any future sale of their property (the transfer fee) be paid to Mass Audubon. The funds generated are used at the neighboring sanctuary to manage wildlife habitat, maintain trails, and conduct programs. The agreement becomes apart of the title of the property, generating additional conservation dollars each time the property changes hands.

### What are the Benefits?

- A simple and straightforward way that you can contribute to the ongoing maintenance and care of a sanctuary near you without impacting your current finances.
- A CLA is not a sale; you continue to own and live in your home.
- Easy to establish, with minimal or no cost to set up: just speak to your legal advisor and work with Mass Audubon to record the necessary document.
- Research shows that having protected land abutting your land may increase the value of your property; a CLA is a way of giving back to support that open space.





## Funding Land Protection through a Conservation Legacy Agreement

### To create a Conservation Legacy Agreement:

1. Talk to your lawyer and/or financial advisor, and contact Mass Audubon to let us know of your interest.
2. If Mass Audubon determines your property is eligible for the Conservation Legacy Agreement program, we will work together with you and your attorney to determine the transfer fee and record the CLA notice.
3. These fees are generally between 1-3% of any sale. Family transfers can also be exempted from this fee.
4. Your property may have important conservation value itself. Mass Audubon's land conservation staff can review and recommend conservation strategies, when appropriate, which can be combined with a CLA under certain circumstances.
5. In the future, when you decide to sell your property, a small percentage of the sale price will go to funding the operation, conservation, and stewardship of your local Sanctuary.

### Property Eligibility:

Mass Audubon will determine property eligibility for the creation of a Conservation Legacy Agreement based on multiple factors, including but not limited to:

- Proximity to an Audubon sanctuary
- Marketability and likelihood of sale of the property
- Previously established liens or other encumbrances on your deed

## Further Questions & More to Consider

If you aren't sure that a CLA is right for you, but you're interested in conserving your land or making a planned gift, please let us know. We'd be happy to talk with you about your wishes and help you explore the many options available for gift planning. Many plans allow you full control and use of your assets during your lifetime, and there are also options which would pay you an income during your lifetime.

Visit [massaudubon.plannedgiving.org](https://massaudubon.plannedgiving.org) for more information or contact us directly.

We look forward to hearing from you. Thank you for considering Mass Audubon in your gift plans.

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### Contact the Gift Planning Department

Betsy Townsend, *Director of Gift Planning*  
[btownsend@massaudubon.org](mailto:btownsend@massaudubon.org)  
781-259-2136

Planning your estate and legacy for future generations, including your charitable interests, takes careful evaluation. We encourage you to consult with your Advisors, as Mass Audubon does not provide individual legal or tax advice.

