

GUEST COLUMN

SAFEGUARDING GREEN SPACES

How advisers collaborate with land trusts to support conservation efforts



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Canadians on the West Coast overwhelmingly support conservation, according to a survey by the Canadian Parks and Wilderness Society, British Columbia Chapter. Of those keen on contributing to environmental efforts, many are highly educated and maintain substantial income.

Professional advisers must be able to provide these eco-conscious clients with advice and insights on private land conservation, which presents a unique mix of financial and legal considerations. Donations by such clients, in collaboration with allied professionals, make conservation efforts possible.

While clients may be urban based, they may also own land beyond city limits and face mounting concerns about what will happen to their property after they're gone. Perhaps their children aren't able to look after it or will succumb to pressures to sell to an encroaching development. To put clients' minds at ease, advisers should ensure successful collaboration with land trusts.

But first, what's a land trust? There are around 155 land trusts (or conservancies) across Canada, which operate as non-profit charitable organizations. They manage and protect private land through donations, acquisitions and conservation agreements (covenants, servitudes and easements). Most are small to mid-size local or regional organizations, while a few are larger country-wide establishments, like Ducks Unlimited Canada and the Nature Conservancy of Canada.

Collaboration with conservancies

Here are a few tips for advisers to establish successful partnerships with land trusts.

- **Nurture existing relationships.** Many land trusts are run by dedicated volunteers without extensive access to resources. If a client wishes to donate

155

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property, they may already have a relationship with a regional land trust where their property is located.

- **Research organizations.** Take a moment to search the land trust you're considering collaborating with on the national charity platform CanadaHelps, which provides detailed overviews, including revenue, expenses and contact information.

Familiarize yourself with the two key organizations in Canada that support the conservation community: the Alliance of Canadian Land Trusts, which empowers land trusts across Canada to be vibrant, unified and effective in advancing land conservation, and the Centre for Land Conservation, which aims to advance respectful conservation and stewardship through collaboration and innovation, and manages the ethical and technical guidelines for land trusts in Canada: the Canadian Land Trust Standards and Practices.

- **Remember one size doesn't fit all.** Land trusts come in all sizes. In some cases, it may make sense for the landowner to offer a gift of land to their local or regional land trust, while other times a larger national group might be a better fit.

- **Establish legacy and peace of mind.** The hallmark of a land trust is the protection and stewardship of the land, or the conservation easement it holds, which limits use in order to preserve it. This gives your client peace of mind in knowing the property will be cared for in perpetuity.

- **Tax benefits.** Land trusts need collaboration with advisers for insights and expertise on financial and legal matters, including tax benefits. This is critical for due diligence, including title searches, certification and addressing issues that need to be corrected before the transaction closes. Keep in mind that land trusts aren't licensed to practice law, so they can't give or appear to give legal advice.

Land trusts are crucial for the essential protection of natural habitats, promoting conservation efforts and nurturing sustainable practices for the well-being of future generations—and allied professionals are invaluable partners. Through their existing relationships with clients, advisers not only have specialized knowledge but can help to set the wheel in motion for future gifts. ♦

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