

# Scenic Rivers Land Trust



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## Scenic Rivers Land Trust presents **Breakfast Briefing on Conservation Easements**

for **Tax, Legal and Real Estate Professionals**

Tuesday September 15<sup>th</sup>, 8:30am-10am

DoubleTree by Hilton Hotel – 210 Holiday Ct, Annapolis, MD 21401

Join us for a continental breakfast, an overview of the legal and tax framework of conservation easements and an introduction to the Scenic Rivers Land Trust, the most active land trust in Anne Arundel County with 61 easements on 2,700 acres.

### Agenda

#### **Welcome**

Nina Fisher, SRLT Board President

#### **Legal Mechanics of Conservation Easements**

Ben Wechsler, Linowes and Blocher

#### **Tax Mechanics and Implications of Easements**

Dick Davies, CohnReznick and David Ballard, Champion Financial Planning Group

#### **SRLT's Easement Criteria, Landowner Interactions and Trends in the Field**

Rick Leader, SRLT Executive Director

#### **Informal discussion and questions**

**Registration** for this no-fee event is required by **September 9<sup>th</sup>** by contacting Sarah Knebel, SRLT Easement Coordinator, at [Sarah@SRLT.org](mailto:Sarah@SRLT.org) or 410-980-6837.

*This briefing is part of SRLT's South River Greenway Series which is generously supported by the Paul and Maxine Frohring Foundation, The Brick Companies, Elm Street Development and DavCo/Wendy's.*

### **Speaker Bios**

**Ben Wechsler – Partner, Linowes and Blocher**, focusing in land use and environmental law, as well as litigation. Prior to joining the firm, Wechsler served as General Counsel of the Assateague Coastal Trust in Berlin, Maryland, and as a commercial and real estate litigator with the San Francisco and Palo Alto offices of Grant Cary Ware & Freidenrich, now part of DLA Piper. His practice focuses on the management of land and water resources, including the Maryland Forest Conservation Act, the Chesapeake and Atlantic Coastal Bays Critical Area Program, and various federal, state, and county programs regulating land use, water quality, and wetlands protection.

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**Richard T. Davies, CPA, is a partner in CohnReznick's Bethesda office** and has been a member of the Real Estate Consulting Group for ten years. He has over 20 years of experience in accounting, finance and valuation services. Richard specializes in historic rehabilitation and qualified low-income community investment transactions. His experience includes financial structuring, financial projection compilations, due-diligence, and support during transaction negotiations for various parties involved in a closing. He has worked with and advised developers, community development entities, investors, and lenders on complex transactions that include multiple types of credits and other challenging structuring issues. Richard's tax credit transaction experience has included several hundred properties throughout the country. He speaks at conferences and seminars nationwide on various tax credit programs. Richard has a BS in Accounting and an MBA in Finance from the University of Maryland, College Park.

**David Ballard, President of Champion Financial Planning Group**, an independent financial planning firm located in Annapolis, MD. He is a Certified Financial Planner who has been helping individuals and families meet their unique goals and objectives for over 18 years. He is passionate about financial stewardship, and works with clients to protect their assets by providing guidance that is objective, holistic and independent. Locally, David has been an impartial financial speaker on Fox News Channel and a contributor in the Washington Post's "Ask the Experts."