ELECTRONIC MATERIALS TABLE OF CONTENTS

**Tab 1** Conservation in Court: Trends, Traps and Trouble  
*Bill Silberstein, Attorney, Kaplan Kirsch & Rockwell LLP -moderator (CO); Rob Levin, Attorney, Law Office of Robert H. Levin (ME)*

1. Slides of Power Point Presentation, Page 2  
2. Outline, Page 18  
3. Case Opinions:  
   a. **Case #1** – Page 21  
      Pine Mountain Preserve v. Commissioner, 76 151 T.C. No. 14 (U.S.T.C. Dec. 27, 2018)(Pine Mountain I);  
   b. **Case #2** – Page 137  
4. Pointers for Balancing Risk on Conservation Easement Permitted Structures, Page 173

**Tab 2** Laying the Foundation for Structures, Buildings and Improvements  
*Bill Silberstein, Attorney, Kaplan Kirsch & Rockwell LLP -moderator (CO); Pat Pregmon, Attorney, Pregmon Law Offices (PA)*

1. Slides of Power Point Presentation, Page 2  
2. Outline, Page 14  
3. Model Grant of Conservation Easement and Declaration of Covenants with Commentary, Page 27

**Tab 3** Residential Buildings and Structures and their Uses  
*Bill Silberstein, Attorney, Kaplan Kirsch & Rockwell LLP -moderator (CO); Larry Kueter, Attorney (CO)*

1. Slides of Power Point Presentation, Page 2  
2. Outline, Page 8  
3. Case Opinions:  
   a. **Case #1** – Page 15  
      Southbury Land Trust, Inc. v. Andricovich, 757 A.2d 1263 (Conn. App. Ct. 2000);  
   b. **Case #2** – Page 20  
   c. **Case #3** – Page 24  
      Maryland Agricultural Land Preservation Foundation et al. v. Claggett, 985 A.2d 565 (Md. 2009);  
   d. **Case #4** – Page 40  
      Summary of French & Pickering Creeks Conservation Trust v. Natale, No. 89-09574, Chester Cty. Ct. of Common Pleas (1989);  
   e. **Case #5** – Page 41  
   f. **Case #6** – Page 59  
Tab 4 Nonresidential Buildings, Structures and Improvements and their Uses
Cathy Howell, Associate General Counsel, The Nature Conservancy -moderator (TX); Tamara Galanter, Attorney, Shute, Mihaly and Weinberger LLP (CA)
1. Slides of Power Point Presentation, Page 2
2. Outline, Page 13
3. Drafting Pointers for the Proceeds Clause in Conservation Easements, Page 29
4. Case Opinions:
   a. Case #1 — Page 34
      Duffy v. Milder, 896 A.2d 27 (R.I. 2006);
   b. Case #2 — Page 46
      Eith v. Ketelhut, 231 Cal.App.5th 1 (2018);
   c. Case #3 — Page 95
      In re Vermont Gas Systems, Inc., 2017 VT 83 (2017);
   d. Case #4 — Page 124
      Lyme Land Conservation Trust, Inc. v. Platner, 159 A.3d 666 (Conn. 2017)(Lyme IV);
   e. Case #5 — Page 139
      Merrill v. Saco Valley Land Trust, No. RE-16-44 (York Cty. Super. Ct. April 29, 2017);
   f. Case #6 — Page 155
      Morgenbesser v. Aquarion Water Co., 888 A. 2d 1078 (2006);
   g. Case #7 — Page 159
   h. Case #8 — Page 164
      PBBM-Rose Hill, Ltd. v. Commissioner, No. 26096-14 (U.S.T.C. 2016)(Sept. 9, 2016 Bench Opinion)(Unpublished);
   i. Case #9 — Page 194
      Soundview Associates v. Town of Riverhead, No 09-cv-4095(JFB) (AKT), 2012 U.S. Dist. LEXIS 140963 (E.D.N.Y. September 28, 2012);
   j. Case #10 — Page 213
      State of New Jersey v. Quaker Valley Farms, 235 N.J. 37 (N.J. 2018)(Quaker Valley Farms III);
   k. Case #11 — Page 254
      United States v. Park, 536 F.3d 1058 (9th Cir. 2008);
   l. Case #12 — Page 259

Tab 5 How Judges Think
Cathy Howell, Associate General Counsel, The Nature Conservancy -moderator (TX); Tracy Collins, Attorney, Waller Smith & Palmer (CT)
1. Slides of Power Point Presentation, Page 2
2. Outline, Page 10
3. Declaration of Restrictive Covenants, Page 19
4. Trial Court Documents, Page 26
5. Trial Court Orders and Decisions, Page 46
7. Connecticut General Statutes, Page 77

Tab 6 Prohibiting Land and Ownership Division: Case Study, Drafting and Lessons
Cathy Howell, Associate General Counsel, The Nature Conservancy -moderator (TX); Carl Silverstein, Attorney and Executive Director, Southern Appalachian Highlands Conservancy (NC); Hanni Muerdter, Conservation Director, Southern Appalachian Highlands Conservancy (NC)
1. Slides of Power Point Presentation, Page 2
2. Outline with Case Summaries, Page 12
3. Case Opinions:
   a. **Case #1** – Page 24
   b. **Case #2** – Page 29
      Buckley v. Greensboro Land Trust, Docket No. 139-7-98 (Orleans Sup. Ct., Vermont April 5, 2000)(UNPUBLISHED);
   c. **Case #3** – Page 34
      In re Strieter, 14-56980 (Bankr. E.D. Mich. May 11, 2015);
   d. **Case #4** – Page 41
   e. **Case #5** – Page 47
   f. **Case #6** – Page 56
      Sagalyn v. Found. for the Pres. of Historic Georgetown, 691 A.2d 107 (D.C. Cir. 1997);
   g. **Case #7** – Page 64
      Stitzel v. State of Maryland, 6 A.3d 935 (Md. Ct. Sp. App. 2010);
   h. **Case #8** – Page 83
      Taylor v. Taylor, 2018 Ohio 1571 (Ct. App. Ohio, 12th Dist. April 23, 2018);
   i. **Case #9** – Page 93
4. Sample Stewardship Newsletter, Page 105

*Tab 7 Loose Lips and Fat Fingers*

Ray Lyons, Attorney, Law Office of Ray Lyons -moderator (MA); Steve Swartz, Attorney, Humane Society of the United States (DC); Sarah Sigman, Attorney, Shute, Mihaly & Weinberger LLP (CA); Catherine Marrion, Attorney, Waller Smith & Palmer (CT)

1. Slides of Power Point Presentation, Page 2
2. Outline, Page 12
3. Case Opinions:
   a. **Case #1** – Page 43
      United States v. Rahman, United States Court of Appeals for the Second Circuit, 189 F.3d 88 (1999);
   b. **Case #2** – Page 46
      GSI Commerce Solutions, Inc. v. BabyCenter, L.L.C., 618 F.3d 204 (2010);
   c. **Case #3** – Page 63
      Blakely v. Lisac, 57 F. Supp. 255 (D. Or. 1972);
   d. **Case #4** – Page 75
   e. **Case #5** – Page 78
   f. **Case #6** – Page 87
      Brantley v. Sears Roebuck & Co., 959 S.W.2d 927 (Mo. App. E.D. 1998);
Case #7 – Page 90

Case #8 – Page 112
Lectrolarm Custom Systems v. Pelco Sales, 212 F.R.D. 567 (E.D. 2002);

Case #9 – Page 119
Metroflight, Inc. v. Argonaut Ins. Co., 403 F.Supp. 1195 (1975);

Case #10 – Page 123
NL Industries v. Commercial Union Ins., 828 F.Supp. 1154 (1993);

Case #11 – Page 137

Articles:

b. Michael Sacksteder, Formal Opinion 95-390 of the ABA's Ethics Committee: Corporate Clients, Conflicts of Interest, and Keeping the Lid on Pandora's Box, 91 Nw. U. L. Rev. 741 (1997), Page 144

7. ABA Formal Op. 01-422, Page 184
8. Rules of Professional Conduct, Page 192
9. Common Interest Agreement, Page 211

Tab 8 Avoiding Traps in Applying the Americans with Disabilities Act to Land Trust Lands and Easements
Ray Lyons, Attorney, Law Office of Ray Lyons -moderator (MA); Rachel Hampton, Attorney, The Nature Conservancy (MN); Ray Lyons, Attorney, Law Office of Ray Lyons (MA)

1. Slides of Power Point Presentation, Page 2
2. Outline, Page 12
5. Baughman v. Walt Disney World Co., 685 F.3d 1131 (2012), Page 43
6. A Practical Guide for Accessible Events, Page 48
7. Other Power-Driven Mobility Device (OPDMD) Assessment Form for TNC Natural Areas, Page 56

Tab 9 Traps for the Unwary in Notable Cases
Ray Lyons, Attorney, Law Office of Ray Lyons -moderator (MA); Rob Levin, Attorney, Law Office of Robert H. Levin (ME)

1. Slides of Power Point Presentation, Page 2
2. Outline and Case Law Summaries, Page 13
3. Case Opinions:
   a. Case #1 – Page 29
      PBBM-Rose Hill, Ltd. v. Commissioner, 900 F.3d 193 (5th Cir. 2018);
   b. Case #2 – Page 66
   c. Case #3 – Page 86
d. **Case #4** – Page 99

e. **Case #5** – Page 112
   Palmolive Building Investors, LLC v. Commissioner, 149 T.C. No. 19 (U.S.T.C. Oct. 10, 2017);

f. **Case #6** – Page 157
   Wendell Falls Development, LLC v. Commissioner, T.C. Memo 2018-45 (U.S.T.C. April 4, 2018)(Wendell Falls I);

g. **Case #7** – Page 175
   Wendell Falls Development, LLC v. Commissioner, T.C. Memo 2018-193 (U.S.T.C. Nov. 20, 2018)(Wendell Falls II);

h. **Case #8** – Page 183
   Triumph Mixed Use Investments III, LLC v. Commissioner, T.C. Memo 2018-65 (U.S.T.C. May 15, 2018);

i. **Case #9** – Page 235

**Tab 10 Additional Materials**
- Faculty biographies
- Detailed Agenda
- Land Trust Alliance Conservation Defense Initiative
- Terrafirma Risk Retention Group LLC Annual Report to Members
- Risk Management Drafting Pointers
- Risk Management Resources
- What You Need to Know from Tax Cases (Shorn of Nuance)
- Roster