



CAPROCK

REAL ESTATE ADVISORS

HISTORICAL PRESERVATION EASEMENT

PRESERVE HISTORY.
PROTECT TOMORROW.



WHAT ARE HISTORICAL PRESERVATION EASEMENTS?

Historical Preservation Easements are legally binding agreements that allow property owners to protect historically significant properties while contributing to their community. By agreeing to limit development or alterations, owners help maintain the cultural or architectural integrity of these properties.

These easements are considered charitable donations under IRS guidelines, often qualifying for significant deductions based on the appraised value of the restricted property. This makes them an appealing choice for clients seeking both financial advantages and philanthropic satisfaction.



BENEFITS OF HISTORICAL PRESERVATION EASEMENTS



SIGNIFICANT TAX SAVINGS

One of the primary incentives for Historical Preservation Easements is the ability to claim substantial deductions. The value of the deduction typically reflects the difference between the property's appraised value before and after the easement is implemented. For instance, a property initially valued at \$2 million may drop to \$1.5 million after the easement, yielding a **\$500,000 deduction** for the owner.



CULTURAL AND COMMUNITY IMPACT

By preserving historically significant sites, property owners contribute to maintaining a community's character and history. This can enhance local tourism, property values, and civic pride while ensuring cultural landmarks remain intact for future generations.



A STRATEGIC TOOL FOR ACCREDITED INVESTORS

High-net-worth clients, including Accredited Investors, often explore Historical Preservation Easements as a strategic addition to their portfolios. This approach combines tax efficiency with a lasting legacy, making it a compelling choice for those looking to balance financial planning and philanthropy.



PRESERVE THE PAST. BENEFIT TODAY. INSPIRE TOMORROW.

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