



The following is a list of organizations that broker the sale of Colorado conservation tax credits. Inclusion on this list does not signify endorsement by or affiliation with Aspen Valley Land Trust.

Colorado Conservation Connection

Marty Zeller
1410 Grant Street, Suite C-306
Denver, CO 80203
303-831-7498 / 303-831-9379 (fax)
mail@coloradoconservationconnection.com

Conservation Resource Center

Mike Strugar
929 Pearl Street, Suite 300
Boulder, CO 80302
303-544-1044 / 303-544-1043 (fax)
mike@taxcreditexchange.com

Conservation Tax Credit Transfer, LLC

Carl Spina & Kevin Shea
7057 Parfet Street
Arvada, CO 80004
303-424-1616 / 303-424-0319 (fax)
www.taxtransfer.net

Family Business Consultants, LLC

318 Canyon Avenue, Suite 100
Fort Collins, CO 80521
970-221-1910 / 970-416-9321 (fax)
carl@jimsprouit.com

Gougér Franzmann & Hooke, LLC

Bill Gougér
400 Inverness Parkway Suite 250
Englewood, CO 80112
720-266-1040 / 720-266-1041 (fax)
B.Gouger@GFHlawfirm.com

Tax Credit Connection, LLC

Ariel Steele
P.O. Box 6618
Longmont, CO 80501
303-827-5851 / 303-682-3275 (fax)
ariel@taxcreditconnection.com

Given current state and federal laws and regulations it is prudent to choose an experienced tax credit broker who can provide peace of mind by completing a thorough due diligence of your donation documents before transferring your tax credit.

Important Questions to Ask When Choosing a Tax Credit Broker

What % of the value of my tax credit will I receive when I use your firm to transfer my credit? _____
Are there any other fees or charges involved in the transfer of my tax credit? _____
Do I have input as to when I will receive the funds from the transfer of my tax credit? _____
What is the average amount of time your firm requires to complete the sale of tax credits? _____
How long has your firm been involved in the transfer of conservation tax credits? _____
How many tax credit transfer transactions has your firm completed? _____

Appraisal Review

Does your firm provide a USPAP compliant appraisal review performed by a licensed appraiser? _____
If you provide such an appraisal review do you charge a fee for this service? _____

Document Review

Does your firm review the following documents for compliance with state and federal regulations?
Appraisal _____
Recorded Deed Conservation Easement _____
Title Commitment or Policy _____
IRS Form 8283 _____
IRS Form 8283 Attachment _____
Donee Acknowledgement Letter _____
Baseline Inventory _____
HB1361 State Requirements _____
Pension Protection Act Requirements _____
IRS Notice 2006-96 Requirements _____
Operating Agreement and Resolution (if needed) _____
Mineral Report (if needed) _____
Recorded Subordination (if needed) _____
Bargain Sale Settlement Statement (if needed) _____

Does your firm stay up to date on new state and federal laws, regulations and notices? _____
Does your firm communicate legislative changes to donors in a timely manner? _____

Does your firm provide the following?

Required state income tax package for conservation credit transfers? _____
Required federal income tax packages for conservation charitable deduction? _____

Service to the Conservation Community

Does your firm participate in Colorado's conservation community by:
Providing service to land trusts and open space programs? _____
Participating in local and statewide conservation organizations? _____