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### **Selecting a Surveyor - questions to ask**

Any search for a used trawler will involve a “due diligence” analysis of the vessel. Just about every financial lender and insurance underwriter will require a recent survey to be submitted in order to qualify for the loan and bind the insurance. The role of a surveyor is to systematically inspect the vessel both in and out of the water to provide a professional opinion on condition and suitability. Another important finding the surveyor will offer is the estimated value of the vessel. Surveyors are very important players in the “job” of helping you buy a boat. It is my recommendation that you work with your yacht broker to identify a list of three or four surveyors to consider and then interview them (by phone) as if you are hiring an employee – because that is what the relationship is. They work for you and it is their job to identify issues of concern. You want to hire someone who you are comfortable with and whom you trust will make a detailed effort to evaluate the boat you are contemplating spending a great deal of money to buy.

In addition to a hull surveyor I strongly recommend an engine/mechanical survey of the machinery by a marine mechanic including oil samples and load tests on batteries (this is a separate evaluation, usually conducted by a different individual).

#### **The following questions are a good start in finding a surveyor:**

1. Look for a surveyor among the NAMS and SAMS surveyor directories. This guarantees that the surveyor has met the organization's standards, tests, screening, and on-going education requirements.
2. Internet search surveyors in owner's groups for types of vessels they are familiar with, ask the groups who they recommend in the area the boat is located.
3. Call boatyards and brokerage houses in the area that service the same type of vessel for recommendations for "buyer's surveyors" that do a good job representing buyers.
4. Focus on surveyors who have experience with the type of construction to be surveyed: FRP, aluminum, steel, in construction and/or repair.
5. Before you hire, make sure the surveyor you like is approved by your insurance underwriter and financial institution.

#### **The following questions are for a phone/email interview of a surveyor:**

1. Are you available on \_\_\_\_\_ date?
2. Are you familiar with \_\_\_\_\_ yard, any suggestions?
3. What is your professional affiliation with accredited surveyor organizations?
4. How long have you been a surveyor?
5. What other similar \_\_\_\_\_ (brand trawler) have you surveyed?
6. Is Boat US familiar with your work for finance and insurance purposes?
7. How much do you charge? Travel fees, etc.

8. Can I write you a check, credit card, cash?
9. How much time will a survey take?
10. How do you like to see the day outlined for a survey – Example: meet at boat – cold start?  
Run boat first, haul out, back to slip?
11. Can you give me a verbal summary of your findings at the end of the day?
12. How long will it take for you to prepare your written report and can you send via email?
13. What are your thoughts on an engine/mechanical survey for a main(s) with \_\_\_\_ hours, wing with \_\_\_\_ hours and generator(s) with \_\_\_\_ hours? Can you work in concert with a mechanic?
14. Can you send me a sample report from another \_\_\_\_\_(similar brand trawler) you have done to see your work?
15. Can you give me the names of other trawler buyers who have used your services to make a decision to buy a \_\_\_\_\_(similar brand trawler)?

**Once you hire surveyor I think it is important to:**

1. Get them a copy of the listing write up to review the boat ahead of time and to help with determination of market value.
2. Make sure a copy of ships log is available on board for surveyor to review – oil changes, major maintenance, etc.
3. Confirm with the broker that the boat is fully operational and all equipment works

**Common items expected to be found on survey (from a sample survey):**

1. Magnetic compass -- Swing or otherwise prove magnetic compass is free of deviation errors while vessel is underway (chart & run a few courses and their reciprocals. (b) Prove compass night light operational (sight at night).
2. Fire Extinguishers: Recommend maintain aboard, mounted in USCG approved type clamp brackets, in visually accessible locations, with annual inspection & tagging by qualified personnel, at least (3) USCG approved type B-1 B-2 portable fire extinguishers. Recommend service and tag all fire extinguishers YEARLY!
3. Post the (now) required carbon monoxide warning stickers at the helm and on the exterior of the hull adjacent the exhaust exit of the genset.
4. Zinc anodes - Recommend the following: (a) Replace the missing or worn out zinc on the ...
5. Dome light bulbs in lazarette need to be replaced
6. Recommend installation of a carbon monoxide and a smoke detector (combination OK) with audio alarm within the living spaces below decks. Recommend at lest (1) unit in each sleeping cabin and in the salon.
7. Gelcoat dings or discoloration
8. Service the life raft if it is out of date
9. New battery required for EPIRB

**Surveyor suggestions:**

Prior to purchasing the vessel it is recommended that the buyer obtain the answers, if possible, to the following questions concerning the history of the vessel.

Has the vessel ever suffered a partial or complete sinking?

Has the vessel ever been involved in a collision?

Has the vessel ever been repaired in any way?

Has an insurance claim of any kind ever been filed for or against the vessel?

Has the vessel ever been struck by lightning?