

## JMYS.com Selecting Surveyors



**JEFF MERRILL**  
YACHT SALES, INC.

3010 Old Ranch Pkwy, Suite 440, Seal Beach, CA 90740  
+1 949.355.4950 | [www.JMYS.com](http://www.JMYS.com)

### **Selecting Surveyors – what to know and questions to ask**

By Jeff Merrill

Your search for a used boat will involve a due diligence analysis of the vessel prior to acceptance. 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 evaluate the vessel both in and out of the water and to provide a professional opinion on compliance with regulations, operation of equipment, deficiencies to be attended to, condition and suitability. Another important finding the surveyor will offer is the estimated value of the vessel. Hull surveyors are vital players in the process of helping you buy a boat. Consult 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. The surveyor works for you and it is his or her 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 interested in buying. These are called “pre-purchase” or “hull evaluation” surveys.

JMYS advises hiring a qualified marine mechanic to conduct an engine/mechanical survey of the machinery. The mechanic should test the engine(s), transmission(s) and generator(s) while underway and pull oil samples to send in to the lab for analysis.

**JMYS strongly recommends a vessel inspection by the best professional yacht consultant in the industry, Steve D’Antonio. You can learn more about his services here:**

[www.stevedmarineconsulting.com](http://www.stevedmarineconsulting.com)

### **The following outline is a good approach as you look for a surveyor:**

1. Look for a surveyor among the NAMS and SAMS surveyor directories. This guarantees that the surveyor is a member in good standing and has met the organization’s standards, and, if required, on-going education requirements. (Be aware that there is no formal testing required to become an accredited surveyor).
2. A good online resource is the Boat/US website surveyor search function:  
[www.boatus.com/insurance/survey.asp](http://www.boatus.com/insurance/survey.asp)
3. Try internet searching for surveyors mentioned in owner's groups and forums to determine past experiences and to find a surveyor who is familiar with the type of boat you want to purchase. You can also ask group members who they recommend in the area the boat is located.
4. Call boatyards and brokerage houses in the area that service the same type of vessel for recommendations for "buyer's surveyors" who do a good job representing buyers.
5. Focus on surveyors who have experience with the type of construction to be surveyed: FRP, aluminum, steel, in construction and/or repair.
6. You can ask the brokers involved for a referral, but this can create a potential ethical conflict of interest and the decision on who to hire should be yours exclusively
7. Before you make your final selection to hire, make sure the surveyor you like is approved by your insurance underwriter and financial institution.

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### **You can ask the following questions by phone/email to interview any potential surveyor:**

1. Are you available on \_\_\_\_\_ date?
2. Are you familiar with \_\_\_\_\_ yard, any alternative haul out suggestions?
3. What is your professional affiliation with accredited surveyor organizations?
4. How long have you been a surveyor?
5. What other similar \_\_\_\_\_ (brand of boat) 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. What form of payment do you accept? Can I write you a check, credit card, cash?
9. How much time will a survey of this type of vessel take?
10. How do you like to see the day outlined for a survey – 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, and generator(s) with \_\_\_\_\_ hours?
14. Can you work in concert with a diesel mechanic?
15. Please send me a sample survey report from another \_\_\_\_\_ (similar brand of boat)
16. Can you give me the names of other (similar brand of boat) buyers who have used your services to make a decision to buy a \_\_\_\_\_ (similar brand of boat)?

### **Once you hire surveyor it is recommended that you:**

1. Send the surveyor a copy of the listing write up to review the boat ahead of time so they know what equipment is included and to help with determination of market value.
2. Make sure the seller has 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 included in the listing specifications will be demonstrated to be in good working order

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

1. Magnetic compass -- Swing or otherwise prove magnetic compass is free of deviation errors.
2. Fire Extinguishers: Minimum quantity. Service and tag all fire extinguishers YEARLY!
3. Zinc anodes - Recommend replace the missing or worn out zinc on the bow thruster.
4. Dome light bulbs in lazarette need to be replaced.
5. Replace exhaust elbow and sea water pump on generator.
6. Recommend installation of a carbon monoxide and a smoke detector in each sleeping cabin
7. Service the life raft if it is out of date.
8. New battery required for EPIRB.

### **Broker suggestions (recommendations to include in your purchase agreement):**

Prior to purchasing the vessel, as a part of the offer, JMYS recommends that as the buyer you obtain written answers to the following questions concerning the history of the vessel.

1. Has the vessel ever suffered a partial or complete sinking?
2. Has the vessel ever been involved in a collision that required repair? If so, where on the vessel?
3. Has the vessel ever been used in charter service?
4. Has an insurance claim of any kind ever been filed for or against the vessel?
5. Has the vessel ever been struck by lightning?
6. Have any major pieces of equipment or machinery every been replaced or been in need of constant repair?
7. Does the seller have specific haul out insurance coverage?