



ONBOARD CLUB
BOAT & YACHT MANAGEMENT

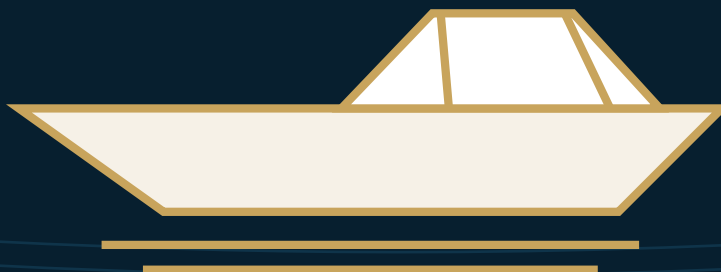
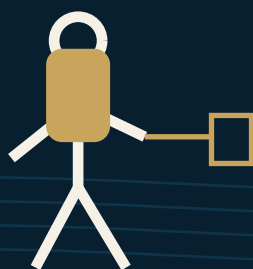
FREE GUIDE



BEFORE THE SURVEY

An operational checklist for anyone considering
the purchase of a used boat

Documents • questions • checks • haul-out • sea trial • report



Focus: boats from 40 ft and above

2026 EDITION

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This guide helps a prospective buyer organise the phase before a pre-purchase survey: collecting documents, asking the right questions, defining the scope, preparing the haul-out and sea trial, and reading the report with a more structured method.

PROFESSIONAL CONTRIBUTION

Guide written with the contribution of a marine surveyor with nearly 30 years of industry experience.

WHAT THIS GUIDE ENABLES YOU TO DO**ARRIVE PREPARED**

- Reduce last-minute requests and fragmented information.
- Compare statements, documents and available evidence.
- Give the surveyor a clearer brief that better supports your decision.

WHAT IT DOES NOT DO

- It is not a survey, certification or technical diagnosis.
- It does not authorise you to dismantle, test or operate onboard systems.
- It does not replace a surveyor, specialist technicians, authorities, insurers or legal advisers.

RESPONSIBLE SCOPE

- Pre-purchase survey: in this guide, a condition inspection commissioned by the prospective buyer; it is neither a guarantee of future performance nor a statutory survey.
- Variable requirements: documents and obligations depend on flag, registration, age, length, private or commercial use, and the country where the transaction takes place.
- Safety: do not enter confined spaces, open electrical panels, disconnect protection devices or start equipment without authorisation and a competent person present.
- Personal data: share documents and photographs only with authorised parties, using secure channels and redacting information that is not required.

Editorial focus: owners and future owners, with particular attention to boats from 40 ft and above. The checklist can also be adapted to smaller craft.

01	VESSEL PROFILE	Identify the boat, intended use and people involved with precision.
02	DOCUMENTS	Request an organised dossier before the visit.
03	QUESTIONS	Compare the declared history with the available evidence.
04	FIRST VISIT	Observe without improvising diagnoses or tests.
05	SCOPE	Define the brief, specialists, haul-out and sea trial.
06	REPORT	Read limitations, priorities, recommendations and further checks.
07	DECISION	Record defects, preliminary cost allowances and conditions for proceeding.

GUIDING RULE: do not look for a generic answer to "Is this a good boat?". Look for enough evidence to decide in relation to your intended use, budget, risk tolerance and the work required.

A concise profile avoids ambiguity, helps the surveyor prepare a quotation and makes it easier to confirm that documents, identification plates and specifications all relate to the same vessel.

MAKE AND MODEL

DECLARED YEAR

LENGTH OVERALL (LOA)

HULL MATERIAL

ENGINE CONFIGURATION

DECLARED ENGINE HOURS

FLAG / REGISTER

PORT AND VISIT LOCATION

CURRENT USE

INTENDED USE

ASKING PRICE

BROKER / SELLER

DATE OF FIRST VISIT

OFFER DEADLINE

THREE QUESTIONS BEFORE PROCEEDING

CHECK		NOTES / EVIDENCE
☐	Intended use is realistic: are navigation area, crew and required level of autonomy appropriate for the vessel?	
☐	Complete budget: in addition to the purchase price, have you allowed for the survey, haul-out, transfer, insurance and initial work?	
☐	Transaction conditions: is the offer subject to a satisfactory survey, sea trial, document review and satisfactory results?	

Do not use this profile as proof of ownership or compliance. It is only a working summary for the prospective buyer.

CANDIDATE VESSEL DOSSIER

- ☐ Title / ownership
- ☐ Identification / registration
- ☐ Compliance / manuals
- ☐ Maintenance / invoices
- ☐ Casualties / work / refit

WIN / HIN / CIN

Hull / vessel identifier
to compare with documents

Requesting documents before the visit is not an attempt to “carry out the survey yourself”. It is a way to understand what exists, what is missing, what must be verified and which specialists may be required.

BEFORE RECEIVING THEM

- Ask for a file index and the date of the latest update.
- Accept copies for the preliminary review; originals should be checked at the appropriate stage.
- Agree on a secure channel and avoid unprotected chat services for sensitive documents.

WHEN THEY ARRIVE

- Check consistency of vessel name, identifiers, dates and registered owners.
- Mark each item as “received”, “to clarify”, “missing” or “not applicable”.
- Do not alter the files received: retain an original copy and work from a separate index.

CHECK		NOTES / EVIDENCE
☐	Title and chain of ownership: bill of sale, invoices, previous transfers or other applicable documents.	
☐	Seller's identity: consistency between the person selling, the registered owner and any powers of attorney.	
☐	Registration and navigation licence: registry certificate/extract, navigation licence or equivalent documentation, where applicable.	
☐	Hull identifier: WIN/HIN/CIN or other identification number to compare with the plate and documents.	
☐	Builder's plate and marking: design data and CE marking where applicable to the vessel's age and market.	
☐	Declaration of conformity: EU/CE or equivalent documentation, where required.	
☐	Owner's manual: a version that can be matched to the vessel and its actual equipment.	
☐	Safety certificate: presence, validity and endorsements, where required.	
☐	Radio documents: ship radio licence, call sign/identifiers and operator qualifications, where applicable.	
☐	VAT, customs and importation: evidence relevant to the vessel's specific history, area and tax status.	
☐	Liens and encumbrances: checks for mortgages, maritime liens, finance, leasing or other rights through the competent channels.	
☐	Insurance policy: useful information on current cover and the future insurer's requirements, without assuming that cover is transferable.	

For recreational craft within its scope, the EU Recreational Craft Directive addresses items such as the craft identification number, builder's plate, marking and owner's manual. For Italian-registered craft, the navigation licence and safety certificate are governed by the applicable national legislation. [3][4][5]

CHECK		NOTES / EVIDENCE
☐	Engine and generator service history: hours, scheduled servicing, analyses, repairs and major replacement parts.	
☐	Systems maintenance: electrical, batteries, fuel, fresh water, waste, air conditioning, hydraulics and steering.	
☐	Rigging and sails: inspections, replacements, age and work, for sailing vessels.	
☐	Haul-outs and antifouling: dates, work completed, products used and photographic records.	
☐	Previous reports: surveys, valuations, insurance inspections, delivery records or sea trials.	
☐	Open defects: lists, reported issues, operating limitations and deferred work.	
☐	Refits and modifications: scope, drawings, approvals, invoices, commissioning tests and updated manuals.	
☐	Casualties and damage: notices, reports, repairs, invoices, acceptance evidence and case closure.	
☐	Warranties: replaced components, terms, expiry dates and transferability.	
☐	Onboard inventory: equipment included in the sale, tender, water toys, spares and tools.	
☐	Manuals and diagrams: OEM manuals, electrical/hydraulic schematics, layouts and equipment lists.	
☐	Selected invoices: significant work, installed components and evidence supporting declared expenditure.	

WHAT REQUIRES IMMEDIATE FOLLOW-UP

- Documents with inconsistent identifiers or missing pages.
- Significant modifications without drawings, approvals or traceability.
- Engine hours, dates and invoices that do not tell a consistent story.
- Casualties described verbally as "minor" without evidence of repair and verification.
- Previous reports referenced during negotiations but not made available.

Send a clear and proportionate request. Avoid aggressive lists or requests for unnecessary personal data: the objective is to prepare due diligence, not replace formal verification.

EXAMPLE MESSAGE TO THE SELLER OR BROKER

Good morning,

Before the visit and any pre-purchase survey, I would like to organise a preliminary review of the available documentation. Could you please share, where applicable, the ownership/registration documents, vessel identification and compliance documents, principal maintenance history, work or refit records, previous surveys, declared casualties, included inventory, and any available manuals or diagrams?

A legible copy is sufficient at this stage. Personal data that is not required may be redacted. Please also indicate which documents are unavailable or will only be presented in original form. Thank you.

RECOMMENDED FOLDER STRUCTURE

00_INDEX_AND_NOTES	01_OWNERSHIP_AND_REGISTRY	02_IDENTIFICATION_AND_COMPLIANCE
03_MANUALS_AND_DIAGRAMS	04_ENGINES_AND_SYSTEMS	05_MAINTENANCE_AND_INVOICES
06_REFIT_AND_MODIFICATIONS	07_SURVEYS_AND_CASUALTIES	08_INVENTORY_AND_WARRANTIES

Suggested naming: YYYY-MM-DD_DOCUMENT-TYPE_DESCRIPTION_REV. Always retain the files received without overwriting them.

CHECK		NOTES / EVIDENCE
☐	How long have you owned the vessel, and how has it been used?	
☐	Who is the legal owner, and who is authorised to negotiate the sale?	
☐	Is the vessel free from finance, leasing, mortgages or other encumbrances?	
☐	Where has it normally been berthed, stored and maintained?	
☐	What is its usual cruising area, and how many hours/days is it used each season?	
☐	Has it been used privately, rented, chartered or operated commercially?	
☐	Why is it being sold at this time?	
☐	Which equipment, tender, spares and tools are included in the price?	
☐	Which keys, codes, digital accounts, software licences or subscriptions will be transferred?	
☐	Which original documents will be available at signing and delivery?	

LISTENING METHOD

A USEFUL ANSWER

- It is specific, placed in time, consistent with the documents and distinguishes what the seller knows from what is assumed.

AN ANSWER TO VERIFY

- It is vague, changes from one conversation to another, minimises significant events or substitutes reassurance for evidence.

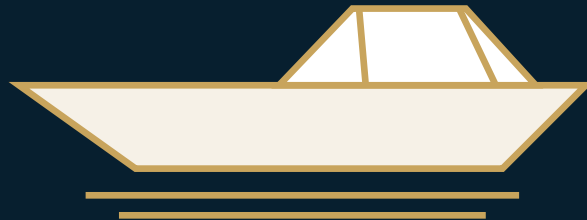
CHECK		NOTES / EVIDENCE
☐	What were the five most recent significant technical jobs, and who carried them out?	
☐	Are there any known defects, recurring alarms or systems that are temporarily isolated?	
☐	Are there known leaks, osmosis, corrosion, delamination or structural repairs?	
☐	Have engines, generators or transmissions suffered overheating, water ingress or major failures?	
☐	Is there abnormal consumption of oil, coolant, fuel or battery capacity?	
☐	Which components are approaching costly maintenance or end of life?	
☐	Has the vessel grounded, collided, been struck by lightning, caught fire, flooded or been involved in an insurance casualty?	
☐	What changes have been made from the original configuration?	
☐	When were the most recent haul-out, sea trial and survey?	
☐	Will the seller authorise the surveyor and specialists to review reports and contact the named service providers?	

EXAMPLE: CONVERTING A STATEMENT INTO EVIDENCE

STATEMENT	EVIDENCE REQUESTED	ACTION
"Engines always serviced"	Invoices, hours, replaced parts, service reports	Compare with hours and serial numbers
"No major casualties"	Written declaration, reports and repairs	Include in the survey scope
"Complete refit in 2023"	Scope, suppliers, drawings and commissioning records	Define what "complete" means

FIRST VISIT

- ☐ Observe
- ☐ Photograph
- ☐ Ask for evidence
- ☐ Do not diagnose
- ☐ Do not dismantle

**DO**

- Record the condition, location and time.
- Photograph with authorisation and keep an orderly sequence.
- Request demonstrations without operating unauthorised systems.
- Record what could not be seen or tested.

DO NOT

- Do not state the cause or severity of a defect.
- Do not open, dismantle or force components.
- Do not enter unsafe or unventilated spaces.
- Do not treat equipment powering up as proof that it is serviceable.

A well-conducted first visit helps prepare the scope. Technical conclusions belong to the competent professional and depend on access, instruments, tests and the agreed terms of engagement.

CHECK		NOTES / EVIDENCE
☐	Visual consistency of the vessel name, home port, plate and accessible identifiers.	
☐	General condition of topsides, gelcoat/paint, joints and visible repairs.	
☐	Deck, side decks, pulpits, handrails, cleats, windlasses and accessible fixings.	
☐	Windows, portlights, hatches, seals and signs of water ingress.	
☐	Teak or deck coverings: wear, caulking, lifting and repairs.	
☐	Anchors, chain, windlass and visible lead paths.	
☐	Rigging, mast and deck gear visible from a safe level.	
☐	Tender, davits, passerelle, bathing platform and handling systems.	
☐	Discharges, seacocks and underwater appendages only when the vessel is hauled out.	
☐	Propellers, shafts/drives, rudders, trim tabs and protection during haul-out.	
☐	Apparent condition of antifouling, anodes, mooring damage or impact marks.	
☐	Odours, leaks or residues beneath the vessel or near discharges.	

Use wording such as "observed", "visible" and "to be verified". Avoid words such as "safe", "structural", "confirmed osmosis" or "no issues" without a competent assessment.

CHECK		NOTES / EVIDENCE
☐	Persistent odours of fuel, exhaust, mould, electrical ozone or black water.	
☐	Bilges: liquids, residue, corrosion, disorganised wiring or pipework.	
☐	Signs of water ingress on headliners, bulkheads, windows and furniture.	
☐	Doors, sole boards and furniture that close poorly or show unusual movement.	
☐	Engine room: cleanliness, visible leaks, corrosion, mounts and accessibility.	
☐	Accessible hoses, clamps, fittings, filters and valves.	
☐	Switchboards and wiring visible without removing protective covers.	
☐	Batteries: securing, ventilation, labels and apparent terminal condition.	
☐	Accessible pumps, pressure systems, water heater, air conditioning and hydraulic systems.	
☐	Toilets, tanks, discharges and indications of leakage or odour.	
☐	Fire-fighting and safety equipment: presence and visible dates, without certifying compliance.	
☐	Manuals, labels, serial numbers and diagrams available onboard.	

WHEN TO STOP THE VISIT

- Strong smell of fuel or gas, smoke, sparks or overheated cables.
- Water ingress, active flooding or an unstable situation.
- Access that requires climbing, removing protection or entering a confined space.
- Any condition where the person responsible for the vessel cannot provide a safe environment.

Photographs can be extremely useful for remembering what was observed and preparing the scope. They should, however, be taken with permission, placed in context and protected.

PHOTOGRAPHIC SEQUENCE

- 1. General view of the area.
- 2. Medium view locating the component.
- 3. Detail with a dimensional reference, where safe.
- 4. Label or serial number, only where necessary.
- 5. Note the date, location, condition and who authorised the photograph.

DATA PROTECTION

- Do not publish registrations, licences, addresses, signatures or insurance data.
- Redact faces, registration numbers, serials and documents when sharing non-technical material.
- Use access-controlled folders and backups.
- Define who may receive the dossier and how long it should be retained.

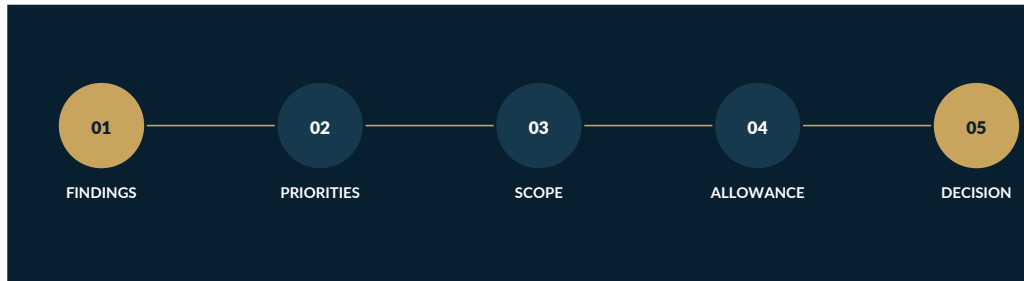
RECOMMENDED NAMING

YYYY-MM-DD_AREA_COMPONENT_NUMBER.jpg | Example: 2026-07-17_ENGINE-ROOM_SEAWATER-PUMP_03.jpg

CONCISE REGISTER

CHECK		NOTES / EVIDENCE
☐	Photograph linked to a specific question or observation.	
☐	Location understandable to someone who was not present.	
☐	No alteration that changes the technical meaning of the image.	
☐	Original retained; any annotated copy stored separately.	
☐	Sharing limited to the seller, broker, surveyor, technicians and authorised advisers.	

A useful survey starts with clear terms of reference. The professional must know why the inspection is being commissioned, which vessel will be examined, which tests can be carried out and which decisions you need to make. The IIMS professional codes emphasise independence, competence and compliance with the agreed terms. [1][2]



CHECK		NOTES / EVIDENCE
☐	Objective: purchase, insurance, valuation, damage or specialist inspection.	
☐	Vessel type, material, age, dimensions and configuration.	
☐	Location, vessel availability and access conditions.	
☐	Inspection afloat, haul-out, hull wash and time ashore.	
☐	Sea trial and persons authorised to command the vessel.	
☐	Systems included, expected functional tests and sampling.	
☐	Inaccessible areas, non-removable components and known limitations.	
☐	Need for specialists: engines, rigging, electrical/electronics, composites, timber, steel/aluminium.	
☐	Report format, photographs, priorities, estimates or requested ranges.	
☐	Timing, fee, cancellation, confidentiality and data handling.	

CHECK		NOTES / EVIDENCE
☐	What experience do you have with this material, vessel type and size range?	
☐	Which qualifications, professional memberships and continuing development can you document?	
☐	Do you carry professional indemnity insurance appropriate to the assignment?	
☐	Are you independent of the seller, broker, yard and any party that may carry out the work?	
☐	Which parts of the inspection will you conduct personally?	
☐	Which systems are included in and excluded from the quotation?	
☐	What do you require from the seller for access, haul-out and tests?	
☐	When do you recommend appointing separate specialist technicians?	
☐	How do you distinguish findings, opinions, limitations and recommendations?	
☐	Do you use a priority scale and provide recommended action times?	
☐	Is a verbal debrief included before the written report?	
☐	How do you manage photographs, sensitive documents and confidentiality?	

SIGNS OF PROFESSIONALISM

- A written quotation and terms of engagement.
- Scope, exclusions and dependencies explained without ambiguity.
- Willingness to disclose conflicts and limitations of competence.
- No promise to “guarantee” the vessel or predict every future failure.
- An anonymised sample report or a clear explanation of the report structure.

VESSEL / MODEL / YEAR

PROPOSED LOCATION AND DATE

SELLER / BROKER

BUYER'S INTENDED USE

HULL MATERIAL

ENGINES / TRANSMISSION

MAIN CONCERNS IDENTIFIED

DOCUMENTS ALREADY RECEIVED

PREVIOUS SURVEYS AVAILABLE

PLANNED HAUL-OUT

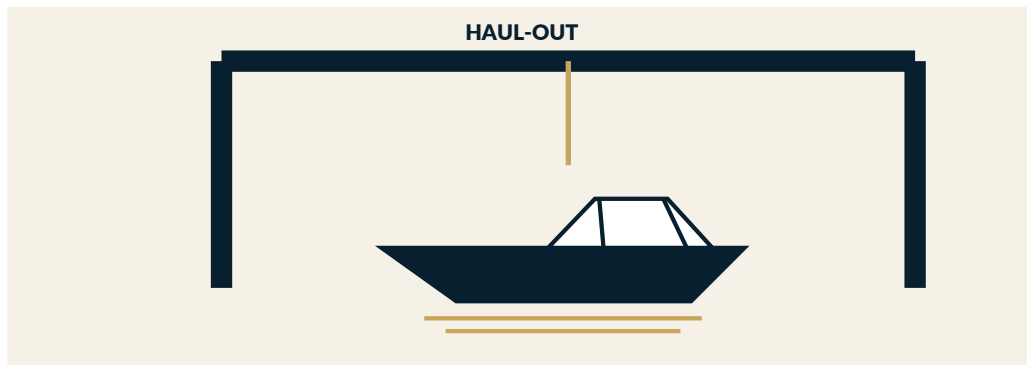
PLANNED SEA TRIAL

SPECIALISTS TO COORDINATE

DECISION QUESTIONS TO INCLUDE IN THE BRIEF

CHECK		NOTES / EVIDENCE
☐	Which conditions require action before purchase or delivery?	
☐	Which checks could not be completed, and what is the consequence?	
☐	Which systems require a separate specialist?	
☐	Which findings may affect safety, insurability, intended use or the initial budget?	
☐	Which recommendations are immediate, short-term or for monitoring?	
☐	Which missing documents must be obtained before proceeding?	

Send the surveyor only relevant documents and only with authorisation. Do not steer the professional towards a preferred conclusion: share facts, concerns and objectives.



For many pre-purchase surveys, an out-of-water inspection is essential to observe areas that are inaccessible afloat. It must be coordinated with the surveyor, yard, seller and the person responsible for the vessel.

CHECK		NOTES / EVIDENCE
☐	Book the travel lift / crane and confirm weight, dimensions and lifting points.	
☐	Obtain written owner authorisation and ensure the responsible person is present.	
☐	Agree the hull wash and allow sufficient time for the inspection.	
☐	Provide lighting, safe access and adequate space around the vessel.	
☐	Ensure yard ladders and equipment are available: do not improvise access.	
☐	Allow observation of the hull, keel, rudders, propellers, shafts/drives, trim tabs, inlets and discharges.	
☐	Allow time for any measurements using the surveyor's chosen method.	
☐	Agree a contingency plan for weather, equipment failure or inability to haul out.	
☐	Define costs, responsibilities and cancellation terms in advance.	

Do not interpret moisture readings, thickness measurements or percussion testing on your own: instruments, surface preparation, ambient conditions and the material all affect the result.

SEA TRIAL

RPM
 temperatures and alarms
 steering response
 vibration and manoeuvring
 systems / recorded data



CHECK		NOTES / EVIDENCE
☐	Confirm insurance, authorisations, the person in command and everyone onboard.	
☐	Ensure the weather forecast and test area are compatible with safety and objectives.	
☐	Fuel, fluids, batteries and systems ready; no unexplained active alarms.	
☐	Where agreed and logistically possible, engines should preferably be cold at start-up.	
☐	Define the route and test sequence before leaving the berth.	
☐	Agree engine speeds and the conditions to observe with the surveyor and specialist.	
☐	Test steering, manoeuvring, vibration, temperatures and alarms in accordance with the scope.	
☐	Test navigation and domestic systems only in safe and authorised conditions.	
☐	Record time, load, sea state and wind to place observations in context.	
☐	No extreme manoeuvres or tests beyond limits set by the person in command and the manuals.	

A satisfactory sea trial does not exclude latent defects. An incomplete trial should be described as a limitation in the report.

TIME	PHASE	OBJECTIVE
08:00	Opening brief	Scope, documents, authorisations and safety.
08:30	Inspection afloat	Exterior, interior, accessible systems and agreed tests.
11:30	Haul-out	Hull, appendages, seacocks and submerged areas.
14:30	Sea trial	Agreed sequence, data and observations.
17:00	Debrief	Main findings, limitations, specialists and next steps.

HOW TO PARTICIPATE WITHOUT INTERFERING

- Group questions and observations at agreed points in the programme.
- Do not request definitive conclusions while the inspection is still under way.
- Do not discuss liability or price with the seller during technical observations.
- Record areas that were inaccessible and tests that were not completed.
- At the end, ask which matters require action before the final report.

PERSONAL KIT

Identification document • non-slip footwear • suitable clothing • notebook/tablet • power bank • water • copy of the scope • list of documents and questions. Technical instruments only when authorised and used by the competent professional.



CHECK		NOTES / EVIDENCE
☐	Scope: what was included and for what purpose?	
☐	Conditions: where, when and under what conditions did the inspection take place?	
☐	Limitations: which areas, systems or tests were inaccessible or unavailable?	
☐	Method: which observations, tests and instruments were used?	
☐	Findings: which facts and conditions were identified?	
☐	Recommendations: what does the surveyor recommend, and with what urgency?	
☐	Specialists: which further checks should be carried out by other professionals?	
☐	Documents: which evidence is missing or inconsistent?	
☐	Conclusions: are they consistent with the scope and limitations without becoming a guarantee?	

Do not read only the executive summary. A significant limitation can change the weight of an apparently reassuring conclusion.

The scale below is a management tool for organising actions after receiving the report. It does not replace the surveyor's classification or professional judgement.

PR.	CLASS	MEANING	DECISION
P1	ESCALATE IMMEDIATELY	Safety, fire, flooding, steering, propulsion, structure, obligations or operating restrictions.	Do not proceed without competent clarification.
P2	BEFORE DELIVERY	Significant condition requiring repair, testing or acceptance before transfer.	Include as a condition or contractual responsibility.
P3	SHORT TERM	Maintenance or deterioration to be planned with a budget and date.	Estimate and include in the first 90-day plan.
P4	MONITOR	Minor or cosmetic observation, or a condition to keep under review.	Record a baseline and review criterion.

QUESTIONS TO ASK AFTER THE REPORT

- Which finding truly changes the decision or the price?
- Which finding requires closure evidence before delivery?
- Which risk remains open because an area was inaccessible?
- Which costs can be estimated and which require specialist quotations?
- Which conditions should appear in the offer or agreement, with competent legal assistance?

Training example only. It does not relate to a real vessel and is not equivalent to technical advice.

FINDING F-07 | PORT ENGINE SEAWATER PUMP

During the test at operating speed, a leak was observed near the seawater pump. The precise source was not determined without dismantling. Inspection by a competent engine technician, repair as necessary and a satisfactory leak test before delivery are recommended.

HOW TO BREAK IT DOWN

Observed fact	Visible leakage under a described operating condition.
Limitation	The cause was not determined without dismantling.
Specialist	Competent engine technician / marine engineer.
Closure criterion	Documented repair and satisfactory leak test.
Decision impact	Condition to clarify and price before delivery, or include in the negotiation.

THE RIGHT QUESTION: "Which documented checks and tests are required to close finding F-07?" Not: "Exactly how much will it cost?" or "Can I use the boat anyway?"

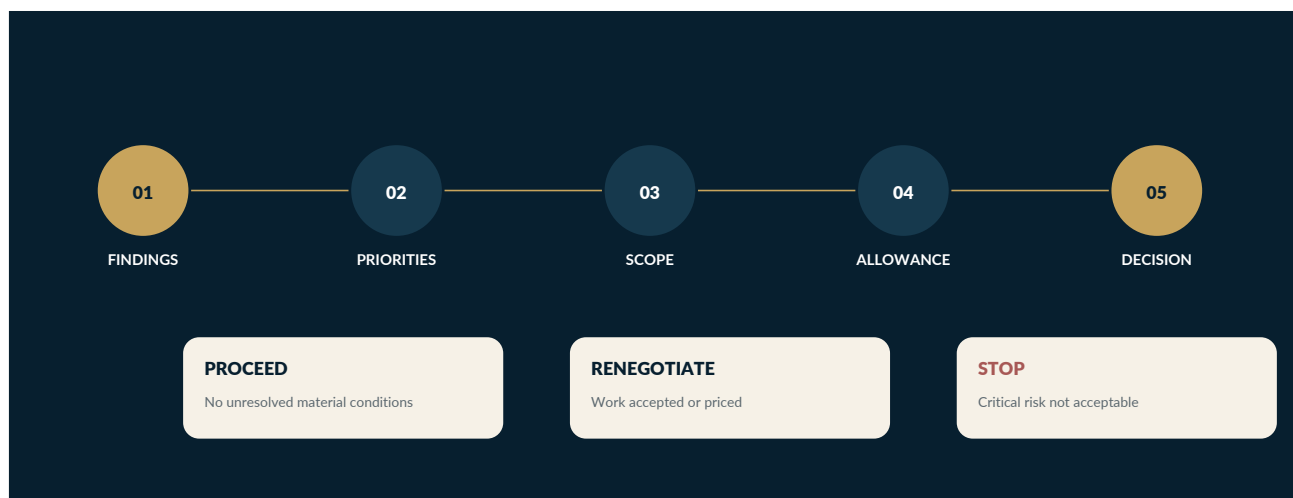
Transfer every significant finding into a register. Always keep the surveyor's technical description separate from your own management allowance and from any quotations received.

ID	FINDING / RECOMMENDATION	PR.	RESP.	DUE	STATUS

PRELIMINARY ALLOWANCE: DO NOT CALL IT A "QUOTATION"

ITEM	BASIS	AMOUNT / RANGE	SOURCE	CONFIDENCE

Include access/haul-out, materials, labour, testing, transport, disposal, taxes and contingency. Label every figure as an "allowance", "indicative range" or "quotation received".

**PROCEED WITH CONDITIONS**

- Findings are compatible with intended use and budget.
- Essential documents can be obtained and verified.
- Pre-delivery actions have an owner and closure evidence.
- Price and conditions reflect work and residual risks.

STOP / PAUSE

- Critical risk is unresolved or an essential area cannot be inspected.
- Identity, ownership or fundamental documents are inconsistent.
- Initial costs exceed the budget and reserve.
- Pressure to waive the survey, haul-out, sea trial or independent checks.

FINAL DASHBOARD

CHECK		NOTES / EVIDENCE
☐	Technical outcome understood, including limitations and further checks.	
☐	First 12-month cost updated with work, insurance and operating costs.	
☐	Contractual conditions reviewed by a competent professional.	
☐	Delivery plan, documents, inventory, keys and access defined.	
☐	Written decision recording accepted risks, conditions and rationale.	

CHECK		NOTES / EVIDENCE
☐	Candidate vessel profile completed.	
☐	Document dossier received and index updated.	
☐	Identifiers compared and discrepancies recorded.	
☐	Questions sent to the seller and answers documented.	
☐	First visit completed without unauthorised tests or access.	
☐	Surveyor selected for competence, independence and scope.	
☐	Terms of engagement, fee, exclusions and privacy accepted.	
☐	Haul-out and sea trial confirmed or recorded as limitations.	
☐	Report read in full, including limitations and recommendations.	
☐	Specialists and further investigations planned.	
☐	Defects transferred to the register with priority and closure criteria.	
☐	Preliminary allowance kept separate from actual quotations.	
☐	Pre-delivery conditions and responsibilities defined.	
☐	Final decision aligned with intended use, budget and risk tolerance.	

THE NEXT STEP

After the purchase, the question changes from "What am I buying?" to "How do I keep costs, maintenance, defects, work, documents and value under control?". ONBOARD CLUB develops guides and operational tools to support this phase with greater structure and clarity.

Concise definitions to support reading. Technical and legal meanings may vary according to the engagement, applicable standards, flag and jurisdiction.

TERM	DEFINITION
Pre-purchase survey	A condition inspection commissioned by the prospective buyer within an agreed scope.
Marine surveyor	A professional who conducts the inspection and reports findings and recommendations within the limits of the engagement and their competence.
Scope / Terms of Reference	The written scope and terms of the engagement: objectives, systems included, tests, exclusions, responsibilities and deliverables.
Finding / recommendation	A condition recorded in the report and the related action or further investigation suggested.
Limitation	An area, system or test that was inaccessible, unavailable or outside the engagement.
WIN / HIN / CIN	Hull or craft identification codes to compare with applicable plates and documents.
Sea trial	An underway test conducted under agreed conditions to observe systems and vessel behaviour included in the scope.
Haul-out	Lifting and placing the vessel ashore so the hull and appendages can be inspected.
P1-P4	The guide's management scale: P1 escalate immediately; P2 before delivery; P3 short term; P4 monitor.
Due diligence	Organised collection and verification of documents, statements and evidence before a decision.
Refit	A coordinated programme of upgrading, repairing or altering the vessel.
Rigging	Mast, standing and running rigging and associated equipment, particularly on sailing vessels.
OEM	Original Equipment Manufacturer: the original manufacturer of a component or system.
Baseline	A documented initial condition used as the reference for later checks.
Allowance	A prudent provisional amount used to plan a cost that has not yet been defined by quotation.
Closure criterion	The evidence or test required to regard a finding as resolved or an action as complete.

This free guide intentionally ends with preparation for the survey. A premium guide is being developed with deeper coverage of construction materials, complex cases and operational tools, including an Excel file for managing documents, defects and cost allowances. To be notified at launch, email almasnautico@gmail.com.

MARINE SURVEY SERIES

- Professional content on the role of the marine surveyor.
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AFTER THE PURCHASE

- Cost and budget control.
- Maintenance, defects, work and documents.
- An organised history and stronger sale readiness.

For information, premium-guide enquiries or access to operational tools:

almasnautico@gmail.com

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Sources consulted for general principles on independence, terms of engagement, recreational-craft identification/compliance and Italian documentation. This guide does not reproduce technical standards and does not replace verification of the current legislation applicable to the individual vessel.

[1] International Institute of Marine Surveying (IIMS)

Code of Conduct: objectivity, independence, competence, confidentiality and clear Terms of Reference.

<https://www.iims.org.uk/membership/code-of-conduct/>

[2] IIMS

Small Craft Code of Practice and information for boat buyers.

<https://www.iims.org.uk/membership/small-craft-code-of-practice/>

[3] European Union

Directive 2013/53/EU on recreational craft and personal watercraft.

<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32013L0053>

[4] Italian Ministry of Infrastructure and Transport

Navigation-licence templates for recreational craft and STED documentation.

<https://www.mit.gov.it/normativa/decreto-dirigenziale-numero-106-del-19062019>

[5] Italian Official Gazette / national legislation

Implementing regulation for the Italian Recreational Craft Code and subsequent applicable amendments.

<https://www.gazzettaufficiale.it/>

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Editorial review: July 2026. Before international distribution or operational use, localise the guide for the relevant flag, jurisdiction and contractual practice.