

Tips on employing an agent to charter or move your boat

by Nelson Weiderman
October 2001

1. **Do your homework.** If you want to save *your* time and money by using an agent, it is important to make the up-front investment to make sure that everything will go smoothly. Fixing problems using lawsuits after the fact will rarely compensate you for losses you might incur by failing to properly research the agent and nail down the details of your project in advance.
2. **Get it in writing.** Do not rely on verbal agreements. If anything goes wrong, you will be in the soup without a contract. Have your lawyer review the agreement or make sure that it is an agreement that has worked for owners many times in the past. An agreement provided by an agent may protect his interests without fully protecting yours.
 - 2a. **Make an inventory.** Compile an inventory and add it to the contract (or even laminate it and put it on the wall next to the nav station) as a "Shedule A". One might even put prices next to the items that have a habit of walking away. [Contributed by Billy Baldwin, CYAN.]
3. **Don't be taken in by a warm smile, a charming personality, and a handshake.** Unfortunately, there are scoundrels in all walks of life. Get references for your prospective agent from former customers not referred to you by the agent herself. Ask your fellow owners, your fleet captain, or your class officers if they have prior experience with the agent.
4. **Think about the contingencies.** If everything goes smoothly, you complete your charter or transport, you make or save some time or money on the deal, and everybody including your agent is happy. But ask the what-if questions. What if the charterer or transporter damages the boat? What if you cannot use your boat for the next two months due to this damage? What if the deposit is not returned by the agent to the charterer? What if equipment or sails that you have stated cannot be used in the charter, are used? What if the transporter does not get the necessary permits for travel? What is the full extent of your liability? The agent's liability? How are any disputes resolved?
5. **Insist on knowing where your boat is and who is in charge at all times.** You are basically entrusting your boat to strangers. Find out how your agent knows where the boat is, and how he communicates with the person in charge, and how often.
6. **Know your charterers and deliverers as well as your agent.** After several positive experiences you may trust your agent to screen these people. But at first you should know what the screening process is and even ask to see all the background information and paperwork yourself. Be sure you know the criteria that are used to check out anybody that is given charge to captain your boat.
7. **Make sure your boat is properly insured for all the activities that are being contemplated.** If the agent is taking on insurance, get the insurance policy in writing and review it yourself or have it reviewed. If you are using your own insurance, make sure you are covered for the risks being taken.

8. **Ask questions.** Ask your agent about insurance, about damages, about loss of use, about wear-and-tear, etc., etc. etc.

Contact [Nelson](#) if you have any refinements to this list of tips.
