PALM BEACH JETS
AVIATION ADVISORY & MANAGEMENT

ACQUISITION ADVISORY
BLANK SAMPLE FRAMEWORK, NOT A CLIENT RESULT

Blank sample framework, not a client result

Aircraft acquisition brief: blank sample framework

This blank, printable framework shows how Palm Beach Jets documents an acquisition decision: what fits the mission, what ownership is likely to require and which issues could change the recommendation. Its contents are specific to each buyer and aircraft. This copy contains no client information, valuation or quotation.

Brief details

BUYER

PREPARED BY (PALM BEACH JETS ADVISOR)

DATE AND VERSION

WHERE THE BUYER IS IN THE PROCESS

- ☐ Choosing a category
- ☐ Comparing models
- ☐ Specific aircraft identified
- ☐ Under agreement, heading to inspection
- ☐ Closing

BUYER'S OTHER ADVISORS

ATTORNEY

CPA

LENDER

INSURANCE BROKER

INSPECTION FACILITY (INDEPENDENT)

OTHER

1. Mission requirements

Requirement	Buyer's answer	Source or confirmation
Routes flown most often, and any route the aircraft must perform Sets the range and airport requirements.		
Typical passengers, baggage and cabin needs Separates categories that look alike on paper.		
Airport and runway considerations Runway length and airport rules can exclude aircraft.		
Expected use, including owner travel versus charter availability Drives hours, crew and management planning.		
Schedule sensitivity and international travel Affects range, crew and support needs.		

2. Candidate shortlist and reasons

For each candidate	Candidate 1	Candidate 2	Candidate 3
Category and model			
Why it is included			
Trade-offs			
On-market or off-market			
Pricing against comparable aircraft			
Open questions			

3. Diligence questions

Question	Finding	Document or source	Could change price, terms or the recommendation?
Records, maintenance status and upcoming inspection events			
Engine and maintenance program coverage			
Damage and ownership history			
Inspection facility, scope and how discrepancies will be handled			
Findings that could change price, terms or the recommendation			

An independent facility performs the pre-purchase inspection within its agreed scope. Palm Beach Jets coordinates the inspection, reviews the findings with the buyer and advises on how they affect price, terms and next steps.

4. Ownership considerations

Consideration	Plan	Who decides or advises
Management and operator arrangements		
Maintenance planning and programs		
Insurance, crew and hangar arrangements		
Charter suitability Modeled conservatively, as a potential offset to some operating costs, not as guaranteed income.		
Financing coordination		
Exit and resale considerations		

Documented decision

What fits the mission, and why	

What ownership is likely to require	
Issues that could change the recommendation	
Next step, owner and date	

Printable sample framework, not a client result. It has no electronic form fields; print it or use it as a checklist in a first conversation. It is not a valuation, a quotation, or tax or legal advice. Palm Beach Jets works alongside the buyer's CPA and attorney, who advise on tax and legal structure. Please do not send confidential financial documents in a first inquiry.

Every heading maps to work described on palmbeachjets.net/aircraft-acquisitions. Detailed records and technical review: Palm Beach Jets, "How to underwrite a mature private jet before you buy" (palmbeachjets.net/insights/pre-owned-private-jet-due-diligence).