**This list is a comprehensive collection of lessons learned over years. It’s not to scare you, but to share with you dozens of small things that collectively or individually impact your trip's success. If you are new, someone with experience will help you… There will be more pictorial docs to help don’t worry.**

**Preparation**

* Review what you need. This list will be the next document coming, stay tuned…
* Make a list of what you have versus what you need.
* Borrow if you can, buy if you have to.
* Minimize what you plan to take to just necessities.
* Buying in advance saves a lot of money, bulk buy with friends.
* Have a checklist for the day prior to leaving.
* Have your breakfast and food prepped and ready for grab and go.
* Research and know where you need to go to check in. Sometimes these can be distant from where you board the boat, like miles.
* Know the parking situation. Does it cost, is there a restroom nearby, how far do you need to walk to get to the boat. Should I carry a cart?
* Look at videos, pics on line of the boat, check-in shop, harbor, parking and know what it all looks like before you go and the order of them. You don’t want to waste time going to the wrong place first. Call and ask questions in advance.

**Night Before**

* Have everything packed ready to leave, even clothing. In the morning you don’t have the attention span to remember. Help your sleepy self in advance.
* Put large and inexpensive items (cooler, tackle bag) in the car. Do not leave your clothing or boots or they will get cold! Cover items with a dark blanket if possible so passerbyers can't get an easy look at a prepped car trip. Lock the car.
* Take or apply your seasickness patch or pill. (me 9 pm)
* Have your checklist with your items all together in one spot.
* Check with your carpool buddy to ensure your channels of communication and your timing is aligned. Mis-communication can ruin a trip.
* Have an emergency plan to Uber or drive yourself. It happens a lot where your ride simply messes up. Be the one who anticipates and prepares for it.

**Morning Of**

* Take your 2nd tablet if you don’t have a patch right when you wake up.
* Take any medical prescriptions or have them packed.
* Run through your checklist in case someone moves something while asleep.
* Always make sure you have your wallet (Drivers License & money) and fishing license before walking out the door. Trip killer if you don’t.
* Do not wear layers in the car on the drive. Remove all layers possible and layer up only prior to going outside where you will remain outside. Your body will adapt with layers you have on inside the vehicle and when you go outside after the fact you’ll be colder especially if your clothing is not fit for conditions. Treat an ocean trip as you would a trip to the snow. Worst case you leave a few layers in the car. Trust me. Make sure everyone in the car does the same. I literally make it a point to get to tee shirt level in the car.
* Use the restroom before you go. Many times they are closed before you can enter the shop or boat.
* Stop by a gas station before you get to your final destination. (bathroom, snacks)
* Traffic work happens in early AM. Many times I have been late thinking there are no road issues. Happens more than you know. Leave early, check traffic apps.

**Arrival**

* Expect at the end of the day all your tightly packed bags open, wet, ect. Now you have a bag of fish to also carry. Items seem to expand at the end of day. If you have to take a good trek back, it may be a few trips. I like to have a folding cart with a few strong long bungee cords so I can open the cart and load it all up for one trip to the car. This is just something I do, after a few hundred charter trips under my belt. Not really required just trying to get you to think about the big picture planning. This is in-depth planning that makes life easier start to finish.
* Don’t lock your keys in the car while you dress up. It happens… to me.
* If you need to and it’s possible, drop your buddy and gear close to the boat then go park. Make sure someone stays with your stuff at all times.
* Before you head to the boat, where’s that check list again?
* Leave nothing visible, lock the car, ect.

**Arrival Continued**

* Lines to get on the boat can start early. Many people have spots they want to get on the boat. If you're one, you already know. Early check in means 1st to be in line for boarding. Some die-hards show up HOURS early.
* Check in for the boat is sometimes in a shop and sometimes at the boat. Know where you check in the day before. Most of the time you pay at check in. Some do not take credit cards or their machines are broken. Heavy cash in-hand is king to avoid some dumb stuff that can happen. Most people pay in full prior to a trip even if it’s not mandatory to avoid unforeseen nightmares.
* Even though you are pre-paid, the shop may require you to still check in at the shop before going to the boat. They want to make sure you have a fishing license, tackle, sign a waiver or form, you're on the right boat, ect.
* Allow for check in time especially if you’ve never been there and if you are “on time”. Keep in mind everyone “on time” creates big lines. You might not miss the boat, but lines suck. Then you get stuck fishing at the very back corner of the boat… Wait, that's my spot!
* A check-in shop may check in MANY boats at a harbor. If this is the case you just might miss your boat, so don’t think you're safe because there is a long line. They might be checking in early for other boats ahead of you being “on time”.

**Boarding the Boat**

* As you wait to board, your rod should be next to you leaning against the wood rail unless there is none and you're holding it. 1-2 bags at your feet. Maybe one on your back/shoulder and the other you hold. This is why you pack efficiently.
* When they say let’s board, you want to be able to pick your bags up with ease, have your rod in hand and make sure you're not fumbling around because you have too many items with you. Be ready to move quickly, but **SAFELY**. Anglers in line behind you will be focused and anxious to get on board in a hurry and get a particular spot they like to fish. Remember it's fishing most the day wherever you are on the boat. If you're sensitive to smoke, avoid the engine area or AFT (very back). If you can’t handle vertical movement, avoid the bow (very front).
* When getting onboard, move slowly and carefully up and over the side. Usually they have a deckhand there to assist. If someone is avail. Hand them your bag or rod (ask nicely), so that you have a free hand to grab a rail for balance.
* If you are new to charters, the middle sides to the back sides are your most friendly positions. The further up the sides the tighter the space.

**Establishing Your Fishing Spot**

* The front of the boat is higher off the water than the back of the boat and typically has the most vertical movement being highest of the water ( ALSO the wettest area of the boat underway). Sides give you a lot of stability to lean against the wall and the most wind protected in general (while fishing not traveling). The back tends to have the least movement, but is the busiest and largest area. The boat engine burns heavy fuel, so it can have a strong smell of smoke especially directly in the middle back. If you're sensitive to burning fuel odor, avoid the back!
* If you do not care about location, get on the boat, place your bag(s) down ***quickly*** around the seating area on the outside deck and ***immediately*** head to the side of the boat (middle to back recommended for beginners) and place your rod at one of the rod holders. This is how you “**mark**” your spot where you will fish for the **whole trip**. It’s not common that you will relocate, which is why experienced anglers have certain spots they prefer to be at for the trip. Don’t block the entrance where people are getting on, so they can get to their spots.
* Rod holders are typically obvious, but on some boats they are not. Spots to fish around the boat are spaced out roughly 3 feet apart. There may be a rod holder or just a “divet or cut out” in the wood rail where the spot is identified. Do not put rods in holders (if present), as they should lean up against or near the rod holder. There is typically a short rope with a clip to prevent the rod from dropping into the ocean when fishing. You can use this to wrap around your rod to prevent it from falling over and hitting someone or getting damaged if it falls to the deck when you walk away. You shouldn’t have any leader or hooks on your rod at this time for this reason (SAFETY). Let the deck hands set up your rod for you. They have specific set ups they will want you to use based on what’s been working. Let the deckhands do their jobs and feel comfortable talking with them.
* Introduce yourself and ask the deckhand and captain's name. When you need help you’ll know who to yell out to as they run around when you need a gaff.
* Once your rod is in its place, your bags are with all the other bags and you know where they are, relax and snap a few pics, enjoy the experience. Grab your water. Next step, the deckhand or captain will do a 5 minute talk with everyone at the back deck. Be there and attentive as everyone needs to listen to their boat rules.

**Pre-Departure**

* Once your rod is secured and bags are settled and in place, a deckhand will ask if you need help to set up your rod. Feel free to watch him, so you can understand and ask questions at that time if you're new. Yes someone may move your bag and sit where you had planned to sit. It happens. Enjoy the trip.
* If you see deckhands running around, wait until they are at rest before speaking with them unless you have an emergency. They have routines and know you will be needing help. They will reach out to you, after they are on track with pre launch tasks.
* Cabin space is usually taken quickly with people using their lunch bag to mark their spot right when they get on the boat. Feel free to do that, but at the risk of getting a specific fishing spot on the rail. Usually the rod spot is a priority for most and the 1st thing they do.
* The travel to the fishing grounds can be long, so if you're young, leave the comfortable bench spots inside for the ladies, senior folks. They appreciate it.
* It’s tough for anyone to pee while rocking, so it’s an acquired talent. If the boat is at rest take advantage when you can.
* #1 rule - DO NOT VOMIT IN SIDE THE BATHROOM OR BOAT.
* #2 rule - DO NOT FLUSH ANY PAPER DOWN TOILET.
* These two rules are always very loudly repeated, as they are most critical. You clog the toilet; It's not pleasant for the crew or others. Barf in an enclosed space, has a lasting aroma the whole trip and nobody is pleased with that. There are 1-2 tiny bathrooms for EVERYONE to share. Respect that space.

**Underway**

* Once the boat is moving, take a seat and hunker down. If you are tired try to get comfortable and take a nap. If you're new to the experience and want to soak it in, enjoy it, you paid for it, you work hard, take it in…
* They will let you walk around the boat, but if the water is choppy and it’s hard to stand, it's not safe to walk around. Use common sense and good judgment. If you're not sure, ask a deckhand if it’s ok to go to the front before doing so. Sometimes I enjoy the solitude at the front. Sometimes there is a pod of dolphins playing at the front as the boat is splitting the water and they are surfing the waves like kids playing in a park. Something special to observe first hand.
* Sun rise pics, whales, sunfish, fresh air. These are reasons for me to get out there myself and reset the soul and mind.

**Fishing**

* Once the captain has found the first spot to fish, do not drop your lines until he says so. The boat continues to move and early droppers cause fast tangles with people on the opposite side of the boat.
* Early drops also get snagged and you lose your leader and sinker! $$$
* Once the boat settles the lines will stay more vertical. ANGLES EQUAL TANGLES as the saying goes. This means if your fishing line is angled under the boat, away from you or to the side, chances to tangle lines with someone else and also get snagged (stuck in a rock) are increased.
* In general, the lines to your left and right and along the whole side of the boat, should all relatively be parallel to each other. Yes there will be some angle, but there is an acceptable range.
* Everybody should be using the same weight size (weight in ounces “OZ”). If this is done, you have much less chance of tangling. When someone uses a smaller weight, the line angles more. When you use a heavier weight your line stays more vertical. Simple physics. I prefer boat crews that insist everyone use the same weight at any given time.
* In calm water conditions with little current (under the water surface) and low wind (surface wind that pushes the boat across the top of the water), lighter weight is easier to reel up and less tiring.
* In windy and or STRONG underwater current, you are forced to use heavy weights to try to keep your line vertical.
* Keeping your line vertical is critical, because when you fish for “rockfish” it’s logical rocks are at the bottom of the ocean where these fish are found. As your weight hits the bottom on the drop of your line, you need to immediately lift your rod tip immediately when you see the line go “SLACK” and quickly reel up 2 full cranks at a minimum. This prevents your weight from getting stuck under or between rocks.
* If your weight does get between rocks or under one while the boat drifts one direction (because of wind and surface current) and the undercurrents are in the opposite direction, your line angles quickly and with more angle the less chance that weight can be “popped” out from between the rocks its stuck in.

**Fishing Cont**

* Keeping near the bottom is the challenge as this is where the fish are, but also the challenge because the rocky bottom can cause you to LOSE a lot of weights also called sinkers as well as leaders that can quickly cost you a lot of money. It’s expected and common for even experienced rockfish anglers to lose from a few to many set ups (leaders and sinkers) on a single trip. How much contour (up and down peaks at the bottom), the texture of the rock structure, the water and wind conditions, the weight size you're using all determine whether you have extreme challenges or an easy time fishing. This is what makes every trip unique and exciting for the average angler.
* “Usually” when there is heavy structure, rocks that have high peaks and deep valleys between rock structures, this is where “JIGGING” is most critical. Jigging is constantly lifting and lowering the rod tip, which results in the sinker raising and lowering. Jigging gives your bait (your hooks with flies, swim baits or dead bait) appear moving that attracts fish. Jigging also allows you to “FEEL” when your weight makes contact with rock structure by going slack, where you should quickly lift the rod up to try and prevent the weight from getting stuck OR your hook from grabbing into a rock (coral reef) that can also break your leader off with your weight.
* Some areas of the ocean bottom have low profile structure that is smooth and you are not as challenged in having to jig so hard to avoid snags. These areas also offer less protection for fish to hide, which results in less concentration of fish. This is a tradeoff the captain decides on based on how much fish he sees on his scanner and the overall skill set of the anglers on the boat.
* There are some specific fish that are not located on the bottom and are called school fish. These fish swim around from the bottom to the top of the water at different depths called “Suspended Fish” in the “Water Column”. I call them “SCHOOLIES”. A few of these varieties are yellows, blues, blacks and olives to list a few. They also tend to be a smaller variety of fish than “Bottom Fish”.
* For “SUSPENDED” fish, the captain may see a huge school and stop over them and instruct the anglers to drop their lines to a SPECIFIC depth. Getting your line to a specific depth is critical if you expect to catch fish. This technique is best explained in person. There is a method for manually pulling your line off your reel in approximately 12” lengths and as you do this you count one pull at a time that is one foot. If the captain says “Fish at 40 feet!!!”, then EVERYONE should be pulling 40 pulls to get to that depth.

**Fishing Cont**

* If you foresee fishing in the ocean for a long time, you can buy a reel that has a LINE COUNTER that literally tells you your depth. SUPER convenient tool/reel for anyone. Unfortunately, you get what you pay for. Buy a cheap reel with a line counter, it probably won't work long. Reels are something you should research and review heavily before buying. Rods are forgiving and you can get lower cost rods that can last a lifetime. Charters rental equipment typically are good examples, because they must last for the business.
* **LINE - Braid Versus Monofilament**
  + **Braid** is a fibrous thread line. The characteristics are little to no stretch, a diameter thickness that is a fraction of what Mono (plastic line) is, HIGH sensitivity that allows you to feel the fish nibble at depth, it’s prone to snap if it gets nicked by a rock, but very high strength otherwise, does not have any “memory” meaning it doesn’t retain a curved shape from being on the reel like mono, it has “low resistance” or “drag” due to its smaller diameter or lower surface area that makes contact with water and is described “cut” through the water or travel faster as a result for example when your releasing the line to the bottom. The smaller diameter also allows you to have significantly more line on the reel when compared to the same weight capacity also referred to as “pound test”. If you have 40# test, this line has a rating of handling a 40 pound fish. 40# mono is 0.024 inches and the braid is 0.013 inches diameter. Half the thickness. Lastly, braid has a much longer life due to the durability and characteristics compared to mono. The down side to braid, is when it tangles, it’s horrible to try and untangle. It’s expected to cut the line versus lose time waiting to untangle.
  + **Monofilament AKA “MONO”** - Mono is simply a man made plastic material extruded into a spool of line for fishing. The characteristics are pretty much opposite of that mentioned in the braid description. Mono has a few advantages. The stretchability is significant and this is important for when a fish is hooked on and is fighting against you reeling in, the mono allows the shock of the fish's head shakes and rapid movement to be absorbed by the line. With this shock absorption, there is less chance of the fish developing slack whereby it could spit the hook and come off, so the stretch to some degree is assisting in providing a constant tension on the line as you reel and fight the fish.
* **Monofilament AKA “MONO” Continued** 
  + Mono is also known to be resistant to nicks that help reduce the risk of a line breaking or snapping like braid is prone to do. When fishing deep water, mono is at a disadvantage when used as your main line, because of the stretch and the lesser sensitivity to feel the end of the line whether you hit bottom or have a fish on. With the boat constantly moving up and down, your line is constantly stretching. If your line gets stuck in the rocks, it's less likely to POP it out because of the stretch being a disadvantage to braid.
* **LINE - Braid Versus Monofilament**
  + Mono is typically used as a LEADER on the end of your main braid line. The leader is a section of 3-6 foot line that has 1-2 hooks and the weight attached to the bottom. Mono is used for the positive reasons mentioned of abrasion resistant to coming in contact with rocks when jigging, the stretch and tension of fighting a fish to avoid a hook ripping from the fish's mouth or spitting the hook and some say because mono is clear, it’s less visible to the fish (line sensitivity). Line sensitivity is believed to be critical for fresh water and shallow water fishing versus ocean fishing FYI.
  + Rental rods are **always** set up with **MONO** as the **main line**. Reason is that mono is cheaper than braid (significantly), it’s forgiving when lines tangle to get untangled and most importantly to the boat owner, it won’t DAMAGE the engine if it gets wound up in their prop like braid will.
* **Reel & Leader Setup**
  + I use 50-65 pound braid for my main line. Main line is what line is on the spool of the reel.
  + I prefer to use a mono leader of 30-40 lb test. (test is line). My leader is usually 2-3 feet long with 2 hooks evenly spread out. The hooks are about 12-14 inches from the center of the leader one above the other. You will fins that store bought/pre-made leaders range about 2 feet in total length. I like my leaders a bit longer and the hooks a littler further apart to cover a bigger gap.
* **Reel & Leader Setup Continued**
  + Your main line will have a clip. Your leader will have a swivel at one end that the main line will clip to. The leader will also have a clip at the bottom, which helps you identify top from bottom, as the clip on the leader (also called a swivel clip) is used to clip a sinker or weight to the bottom of the leader.
  + The sinker is the very lowest point of the leader. This sinker will be a lead ball or torpedo shaped piece of lead and weigh anywhere from 6 oz to 24 oz. For deep water and or aggressive conditions (wind and water current), you use 12-24 oz weight. Again this is what helps you stay vertical and at the same time reach the bottom where the fish typically are. If you cannot stay within a few feet of the bottom (and as vertical as possible) you have less chance to catch fish.
* **LEADER OPTIONS - Two Common Setups**
* First is off the shelf store bought leader with the two hooks and the lead weight at the bottom. For the lead weight, I recommend the torpedo shape weight because the slim design has a better chance to “POP” it out of the rocks if it gets “snagged” or stuck.
* Second setup is the custom made leader using just one hook on the leader line and instead of the lead weight on the bottom, you use a “JIG”, which is essentially a fancy decorative weight that also contains a single hook on it. The jig is used as the weight to get it down vertically and also as a LURE or BAIT for the fish to eat as bait. This setup is used by more advanced anglers as the jigs are expensive to put at risk of losing to a snag and secondly, they contain a hook which adds an extra item that can catch onto rock, kelp or also get stuck in a tight area where you end up not being able to get it out and you break your line losing your leader and an expensive jig (usually $10-25 each).
* Lead weights are usually around $4-8 each in store and $8-12 on the boat or at the marina store where you check in. This is why it’s recommended to buy prior to the last resort. It’s far easier to be happy using the 1st leader set up with a cheaper weight versus the jig. You can still catch the big fish at a lower risk of investment. You can also put a bigger bait on the 2 hooks, which essentially replicates the concept of having a big jig/lure at the bottom.
* **BAIT VERSE LURE**

**BAIT**

* + Bait is literally that. A piece of squid, shrimp, octopus, anchovy or other type of dead ocean animal that is used to attract a fish. For fresh water comparison you use a worm, salmon egg, chicken liver, ect.
  + Bait can be alive or dead. Whole or cut up. On a charter, the boat will provide either frozen anchovy OR frozen squid that they cut up into strips. You add this to your hook as an added attractant.
  + If you happen to get a live bait on the water, live bait RULES. On occasion you will get a fish up and out comes a live octopus or squid. This is absolute GOLD! Great chance if you put that on your hook, lure or jig and drop it down, you will have a fish in minutes… Anything that comes from their direct environment is the most preferred bait. This is why you will find Youtubers (who are successful) catching and using ONLY live bait, because they understand this is what catches the biggest and most fish hands down and that's what they depend on for content.
  + My FAV in this order - Octopus, Squid, Herring, Sardine, Smelt, King Fish, Sand Dab
  + There are also liquid scents in a bottle you can buy and you squeeze a little of the scent onto the BAIT to add even more attractant. Popular scents are octopus, sardine, anchovy, shrimp, ect. For saltwater fishing. Fresh water is a totally different group, same concept.

**LURE**

* + You can buy different types of Lures hard tied to your pre-bought leader. These options will have different descriptions such as “Rock Cod Leader” or “Ling Cod Leader”. They can be a 2 colored feather on a hook or it could be a rubber shaped mini squid or octopus with a hook inside of it. All of these leaders will work. Most anglers will get a mix of different colors and types, as there tends to be variations that will work in one spot or in one day while others are less successful catching fish.
  + The pre-bought leaders are good because they are generally cheap ($3-6) range for a leader. At the boat, $6-8 ea. They come in sealed packs that are flat, easy to store and little risk of getting poked by a hook. They are effective at catching fish and made with consistent reliable quality products and processes.

**LURE Continued**

* + If you happen to have a friend who makes leaders, you can specify custom lengths, hardware and options. With that said, you have a much larger variety of lures, jigs and swim baits you can use. It’s limitless. This is typically what more seasoned anglers do is make their own leaders up and have an arsenal of lures that they make to clip on for easy change out.
  + For Color Options here is my personal preferences
    - Shrimp Flies - Yellow/Red or White/Pink
    - Squid (Ling Cod Jig Label still awesome for Rockfish)
      * All White, ORG/BLK and Purple
* **OTHER SUGGESTIONS**
  + I have seen the simplest setups catch the largest and biggest # of fish. It doesn’t mean this will work every time, but when it does it’s jaw dropping. This is a two hook (large hooks like 7-9/0) with a whole frozen squid in each hook and a lead weight at the bottom.
  + When jigs might be working or not working there are certain things that trigger bites. Sometimes a fish doesn’t like certain colors, a type of set up or a set up with TWO hooks. I have seen where a single hook gets bit when every other person is using a two hook set up with no luck.
  + I personally always take my own box of squid (usually 2 boxes for my son and I - 5 lb box) as the boat won’t give away the whole squid. They expect the squid to be used as an added attractant and not the whole bait as that would be too expensive to offer. You will see when you go to buy it. I like having a multitude of leader setups, baits, ect. That is the part I enjoy is experimenting to see if I can find what is the combo that hits consistently.

**SUMMARY**

If you really got this far, congrats. You will over time become your own tackle expert and make your own set ups if it’s your passion. It’s simply way more cost effective and rewarding to know your creative work outfished the whole boat.

For the beginners, don’t let this overwhelm you. I go into much depth to offer insight and exemplify the diversity of what you can get out of the sport/hobby. It can be a simple low cost once a year event or whatever you choose to make it. For myself, it was how I bonded with my son throughout his childhood starting at 6. Fishing allowed him to acquire skills and traits beyond the options society standardized activities offer or develop. I look forward to fishing with you all out on the deep water….