

Travel Planning Guide

Preparing for Your Advisor Meeting

Use this form to gather your thoughts and preferences before meeting with your travel advisor. This will help them design the perfect trip for you!

1. Travel Details

- What is your destination (or destinations) of interest?

- What are your travel dates or preferred travel window?
- Are your dates flexible? If so, what alternative dates might work for you?

2. Budget

- What is your total budget for the trip?
(Include accommodations, transportation, meals, activities, etc.)

- Are you open to adjusting your budget for special experiences or upgrades?
If so, in what areas?

3. Travel Style & Preferences

- What type of trip are you envisioning?
(e.g., relaxation, adventure, cultural, romantic, family-friendly, etc.)

- How do you like to spend your days while traveling?
(e.g., sightseeing, relaxing by the pool, outdoor activities, shopping, etc.)

- Do you prefer a fast-paced itinerary, a leisurely one, or something in between?

4. Accommodations

- What type of lodging do you prefer?
(e.g., luxury hotel, boutique inn, vacation rental, resort, etc.)

- Do you have specific requirements for your accommodations?
(e.g., pet-friendly, wheelchair accessible, specific amenities like a pool or spa, etc.)

5. Special Requirements & Requests

- Do you or your travel companions have any dietary restrictions or food allergies?

- Are there any mobility or health considerations to take into account?

- Are you celebrating a special occasion?
(e.g., birthday, honeymoon, anniversary, graduation, etc.)

- Do you need assistance arranging child care or pet care while on your trip?

6. Transportation

- How do you prefer to travel to your destination? (e.g., airplane, car, train, cruise, etc.)

- Do you have a preferred airline or frequent flyer program?

- Will you need assistance arranging local transportation? (e.g., rental car, private driver, public transit guidance, etc.)

7. Activities & Experiences

- Are there any specific activities or experiences you would like to include? (e.g., wine tasting, museum tours, hiking, cooking classes, etc.)

- Are there any bucket-list items you want to check off?

- Do you prefer group tours, private tours, or exploring independently?

8. Travel Companions

- How many people are traveling with you, and what are their ages?

- Do your companions have any special needs or preferences?

- Are you traveling with pets? If so, what arrangements do you need?

9. Misc. Details

- Are there any travel restrictions or requirements (e.g., visas, vaccinations, etc.) you need assistance with?

- Have you worked with a travel advisor before?
If so, what worked well and what could have been better?

- Are there any additional details or preferences you'd like to share?