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### 1-TA Standard Client Forms – Product ID TA-1300SF

The following forms are contained within this package. Once downloaded these forms, documents and worksheets can be used as masters, branded, added to your stationary and then copied to your desktop each time you want to use them.

#### 1-Form 1301SF©2017- **Electronic Signature Instructions** (Preset form – Word Document)

◆ This note provides instructions on how to create an electronic signature for signing the Credit Card Authorization and Insurance Waiver Forms electronically. Only the PDF formatted forms are set up to receive an electronic signature. *You can choose to have them sign these forms using a regular wet signature too.*

#### 2-Form 1302SF©2017- **Profile & Forms Instructions Letter** (Preset form – Word Document)

◆ This letter is sent with the profile forms. I tell clients to read it carefully. It describes my services, my fees and why I need the forms signed and returned to me as soon as possible. Most will return these forms within 24-48 hours. If I don't receive the forms after 3 days, I will call, text and send an email to follow-up. I will not hound them. Those who don't respond, I toss the trip planning questionnaire and move on. I won't work without those forms or for free. *This method eliminates the shoppers.*

#### 3-Form 1303SF©2017- **Credit Card Authorization** (PDF and Preset form – Word Document)

◆ This fillable form authorizes us/our agency and our host agency to charge for all approved travel services rendered such as booking reservations, any cancellation fees plus our service fees. *By law you must have this signed authorization; I use an Electronic Signature/Certificate preferred. You can convert this form to PDF after adding your agency info.*

#### 4-Form 1304SF©2017- **Confidential Traveler Profile** (PDF and Preset form – Word Document)

◆ This fillable form is for personal contact information. It is most important because it gives you all the data needed to commence planning their trip and what information is needed by our suppliers. *You must get copies of their driver's licenses' and passports because it shows their legal names which we need to know (no nicknames). This information must be kept in a secured place. I don't start any work without these forms (1303, 1304 & 1306).*

#### 5-Form 1305SF©2017- **Children's Profile** (PDF and Preset form – Word Document)

◆ This fillable form is used in the event there are children traveling alone or with adults. I like having a separate sheet to attach to the client's profile. *If children are traveling alone, with one parent or a guardian, they will also need the Consent Letter (form 1206AF) signed by both parents and witnessed or notarized. I only send this form if children are traveling on the trip.*

#### 6-Form 1306SF©2017- **Insurance Waiver** (PDF and Preset form – Word Document)

◆ This fillable form is very important because it will protect you “to a certain degree” if something happens and the client did not purchase the travel insurance. Having the client's signature ensures their acknowledgement and they at least glanced at the document. Plus, it lets you know whether they are accepting or declining travel insurance. *(Electronic Signature/Certificate preferred).*

#### 7-Form 1307SF©2017- **Drop Box Instructions** (Preset form – Word Document)

◆ These instructions help clients set up a Drop Box account. Using Drop Box is a more secure way to transmit personal and confidential documents if your email is not encrypted or you don't have a VPN (Virtual Private Network).

### **BONUS FORM (Complimentary)**

#### Form 1308SF©2017- **NOTICE: How Travel Agents Earn Their Living** (Preset form – Word Document)

◆ An informative letter for those clueless potential clients who don't know what we really do or how we earn our living. I created this letter to help clients better understand the timely tasks travel agents perform and how we are paid for the work we do.

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### **2-TA Administrative1 Forms - Product ID TA-1200SF**

The following forms are contained within this package. Once downloaded these forms, document and worksheets can be used as masters, branded, and then copied to your desktop each time you want to use them.

#### **1-Form 1201AF©2017- Client Trip Planning Questionnaire (for Office Use) (PDF & Static Word Document)**

◆This form is used to qualify the clients regarding the trip they are planning with you. These questions will provide most of the answers you will need to begin the process and give you some insight on their needs. As you research and gather more information you will have other questions to ask the client(s) as well. This questionnaire helps get the ball rolling. For Office use however, you can also send it to the client to fill out if you prefer. But I have found it is more personal to go over these questions with them on the phone or in person.

#### **2-Form 1202AF©2017- Client To Do List (for Office Use) (Static Excel Sheet)**

◆This form is used by the agent to keep track of the trip planning process with step by step reminders. You can remove my notes in the right column and replace with your own. It is pretty cut and dry.

#### **3-Form 1203AF©2017- Welcome Aboard Letter (for client) (Static Word Doc Letter)**

◆This letter is sent to the client(s) after I receive their signed profile paperwork. This letter thanks the client for choosing our agency, summarizes who we are and what we do. It gives them links to our website and blog and welcomes them aboard. Just another way to stay in touch and show you care are sincere and professional.

#### **4-Form 1204AF©2017- Welcome Back Letter (for client) (Static Word Doc Letter)**

◆This is an important letter to send to the clients. It lets them know that you haven't forgotten them and would like their feedback and reviews of their recent trip. I send this letter via email a day before the client returns home. A reminder is added to my Outlook calendar for each client's return date so I don't forget to send it.

#### **5-Form 1205AF©2017- Vacation Survey (for client) (PDF and Static Word Docs)**

◆This survey is very helpful because it asks the client to review various aspects of their trip and also to give your services a rating. Most of my clients fill out the form and return it; some will call me and tell me about their trip, while others will add a testimonial to my website. It is an option and their choice. It pays to ask for their reviews though because you can let the suppliers know if something went wrong or was dissatisfactory. I send this survey along with the Welcome Back Letter the day before they return home.

#### **6-Form 1207AF©2017- Agency Disclaimer (for client) (Static Word Docs)**

◆This disclaimer gives information for which the client needs to be reminded; I send it with their final documents.

#### **7-Form 1208AF©2017- Client's Pre-Travel Check List (for client) (PDF and Static Excel Docs)**

◆This form is a reminder about things clients should do before travel commences like arrangements to make, documents to gather and things to pack. I send this along with their final documents as a courtesy.

### **BONUS FORM (Complimentary)**

#### **Form 1206AF©2017- Child Consent Authorization Letter (for client) (PDF and Static Word Docs)**

◆This letter is important and necessary whenever child/children is/are traveling alone or with only one parent or a guardian. The custodian parent must give his or her consent for the child to travel. This consent form is required by the airlines, without it a child will not be able to take an international flight.