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Description of Contracts & Forms

6-TA Travel Agent Agreements and Contracts (office/client use) - Product ID 6TA-1800SC

Contracts are an important addition to your administrative business arsenal. A contract is a promise between two or more parties to ensure something agreed upon which is legally binding and enforceable. The following contracts listed below are contained within this package. Once downloaded these word/excel formatted documents can be used as masters or modified to suit your agencies needs. The static formats are sent to client for completing, signing, and returning to you via Fax, eFax or U.S Mail. No PDF versions for this package, since these agreements should be hand signed rather than electronically.

1- Form 1801SC©2018 - Travel Services and Management Agreement (office use/Client) (static)

◆ This contract is used for **single individuals** to create an agreement detailing the type of business relationship created between you and your client. It specifies the services your agency provides, agency terms, conditions, and what you expect from the client now and in the future.

2-Form 1802SC©2018 - Travel Retainer Agreement (Long Term) (Client) (static)

◆ This contract is used to create a “work for hire” agreement. A retainer is mainly used for upscale or business clients who travel frequently and need your consulting and planning services on an ongoing basis. You can charge whatever you want per hour for the number of hours you’ll work per month.

2A-Form 1802aSC©2018 - Agency Retainer Agreement (Short Term) (Client) (static)

◆ This contract can be used for DIY travelers who have booked their own air, and/or hotel, etc., but contact you at the last minute to utilize your Travel Concierge (consultation and travel assistance) services for additional bookings, insurance purchase and/or potential travel disruptions or emergencies.

2B-Form 1802bSC©2018 - Retainer Billing Statement (Client) (static-Excel)

◆ This form is used for monthly billing of clients after their initial retainer payment. This statement shows the amount of time worked, sums deducted and amounts owing by client, if any per month.

2C-Form 1802cSC©2018 - Amended Retainer Agreement (Client) (static)

◆ This contract can be used to amend an earlier retainer agreement with a client for new payment terms and conditions once the original retainer funds have been exhausted.

3A-Form 1803aSC©2018 – Standard Group Travel Services Agreement (office/client use) (static)

◆ This contract is used to create an agreement that outlines the understanding between agency and the group leader. It is meant for **large group** (25 or more) trip planning and in combination with your agency’s credit card authorization/service fee agreement and other profile documentation you will send to client for signature before commencing your planning services.

3B-Form 1803bSC©2018 – Small Group Travel Services Agreement (office/client use) (static)

◆ This contract is used to create an agreement that outlines the understanding between agency and the group leader for planning **small group** travel. Use this form for smaller groups (10 to 24 people) in conjunction with your agency’s credit card authorization/service fee agreement and other profile documentation you will send to client for signature before commencing your planning services.

4-Form 1804SC©2018 – Agency Independent Contractor Agreement (office use) (static)

◆ This contract is used to secure independent contractors/sub-travel agents under your agency. An IC Agreement is necessary to form a legal affiliation with your agency, so an Agent can work as an independent sales agent under you and your host. This contract clearly outlines your terms and conditions and their rights. *Use the IC Questionnaire to qualify new agents first to determine suitability.*

5-Form 1805SC©2018 – Potential New Travel Agent (IC) Questionnaire (office use) (static)

◆ This form is used to qualify potential Independent Contractors over the phone who are interested in being affiliated with you. It is vitally important to have any potential IC answer these questions to

determine eligibility to be a TA. You are looking for qualified candidates who want to be professional travel agents, not just want to travel for free. Every sales assistant helps build your business too.

6-Form 1806SC©2018 – New Travel Agent (IC) Application (office use) (static)

◆ This form is used to gather personal information from newly eligible travel agents in conjunction with the IC Agreement. You will need this contact and information from them to pay their commissions and issue agent an IRS 1099 form. You can provide a copy of a [W9 form](#) for the IC to complete and return to you along with this application.

7A-Form 1807aSC©2018 – Event Planning (Corporate, Family Reunions, etc.) (office use) (static)

◆ This contract is used to provide your agency's services as an event planner for corporate, social and special occasion event travel. It outlines what services you shall provide and are responsible for when planning Client's special event. What you charge, the scope of your work and what is expected of client.

7B-Form 1807bSC©2018 – Wedding Planner (Local and Destination Weddings) (office use) (static)

◆ This contract is used to assist your Clients for their wedding planning which may involve travel arrangements for Clients and Guests. You will work with Clients and private venues or hotel/resort coordinators to design the perfect wedding for the Bride and Groom. Similar to an event planner, you will coordinate and manage all aspects of the entire event to make sure everything goes as planned.

7C-Form 1807cSC©2018 – Event Planning Cover Letter (office use) (static)

◆ This letter is used as a welcome to your Clients for contracting you for their Event planning needs. To be sent along with the Event or Wedding Planning Contract.

8-Form 1808SC©2018 - Client Requested Itinerary Changes (office/client use) (static)

◆ This contract is used whenever a client requests a partial or full change to their itinerary. You should charge for this service (labor and time costs), especially if you have already created a full itinerary.

9-Form 1809SC©2018 - Agency Proposal (office/client use) (static)

◆ This document is used whenever a client requests a proposal which outlines your services in detail and proposes what you can offer the Client that makes you stand out from the crowd. Every so often you will be asked for a business proposal by a Client for comparison with other services in order to form an ongoing working relationship. This business proposal is designed for travel agents. You can modify this proposal to fit your agency's characteristics and offerings.

9A-Form 1809aSC©2018 - Agency Proposal Cover Letter (office/client use) (static)

◆ This cover letter is used to send to a potential client along with the agency proposal they requested.

TWO BONUS FORMS (Complimentary)

10-Form 1810SC©2018- Service Fee Schedule & Payment Policy (office/client use) (static)

◆ This form is used for listing your service fees for various transactions. You can add your own pricing, prices listed are only examples. Also, this schedule can be added to your website or given to clients or just kept in your office as a reference. Modify it anyway you want.

10A-Form 18010aSC©2018- Client Referral Discount Certificate (office/client use) (static)

◆ This certificate is used for marketing. You can give them out to your clients for referring new clients to you. Both your clients and those they refer to you will receive a **30% discount off your service fees** for their first trip transaction with you. Your client will receive a **30%** discount off their next trip transaction service fee. One certificate per person traveling with a referral client for 1st trip transaction with you. *It's a good marketing tool.* This certificate can only be redeemed by the original recipient. Not valid with other offers, discounts or promotions. This certificate has no monetary value and cannot be redeemed for cash.