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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 Administrative 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.

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3-TA Administrative2 Forms - Product ID TA-1100AF

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

1-Form 1101AF©2017- Cruise Planning Questionnaire (PDF & Static Formats)

These are questions that I usually ask a client when planning a cruise whether for individuals or groups. I prefer to banter and exchange ideas with my clients to create ease and trust. You can add more questions to this document. You or the client can fill out the questionnaire, whatever you prefer to do.

2-Form 1102AF©2017- Cruise Quote Worksheet (for office use) (static)

This is the form I use to keep track of the expenditures and quotes as I get them for the client (for office use only). This information can be later transferred to the Client Trip Budget Cost Breakdown to send to client. It not only helps me keep track of their expenses for budget, it also gives me an estimate of my commissions.

3-Form 1103AF©2017- Cruise Vacation Quote Comparisons (for client) (static)

This worksheet is for comparing two different cruise lines with similar itineraries and for generating quotes for the client(s). It helps them decide on which cruise or cruise line to choose. They appreciate seeing the comparisons. This form works well for clients who have not decided on a specific cruise or cruise line.

4-Form 1104AF©2017- Hotel-Resort Quote Comparisons (for client) (static)

This worksheet compares the costs of staying at different hotels in the same city or several different cities. The Hotel-Resort form is for generating quotes and comparisons for the client to decide where they would like to stay on their trip. My clients really like this sheet of information. This is good for electing to stay at one hotel or resort.

5-Form 1105AF©2017- Romance Questionnaire (PDF & Static Formats)

These are questions that I usually ask a client when planning a romantic trip whether for individual couples or groups destination weddings. You can add more questions to this document. You or the client can fill out the questionnaire.

6-Form 1106AF©2017- Client Trip Budget Cost Breakdown (for client) (Static Format)

This spreadsheet is for breaking down your client's trip costs for them. Whether a client asks for this cost breakdown or not I always supply one. It is easy to fill out and send to the client once you have received all the quotes from the suppliers. It also helps you stay on budget for the client as you add each component of their trip.

7-Form 1107AF©2017- Trip Summary-Itinerary (for client) (static) (3 forms)

This is a summary of the clients' itinerary. This form is filled out by the agent after receiving all the trip/product confirmations. It is given to the client along with their final documents. I make a copy to put into their physical folders with their trip docs. There are three forms on this worksheet (*Hotels, Cruises, Pre or Post Stays*).

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4-TA Office Administrative3_Forms-Worksheets (Groups) Product ID TA-1000AF

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

1-Form 1002AF©2017- Group Trip Questionnaire (client) (office use) (static)

◆This questionnaire form is used for groups with questions to ask the group leader. It can be modified to suit your needs. This form uses very basic open and closed end questions.

2-Form 1003AF©2017- Cruise Group Ship Quote (client) (static)

◆This worksheet is used to work on group cruises to gather all the information needed for cabin quotes for group. Then can add information to the quote worksheet to give clients for their proposed cruise. You can convert this form to a pdf after filling out for client. Mostly used to Compare the price of two different Cruises or Cruise Lines if necessary.

3-Form 1004AF©2017- Group Form - Tour Operator (office use) (static)

◆This form was originally designed to give to Tour Operators. Now it is used as trip information and to keep track of the group. I get the answers from the group questionnaires to fill this out.

4-Form 1005AF©2017- Group PAX List for Client (pdf-static)

◆This spreadsheet is for gathering the contact/travel information for the group members. I give this to the group leader to fill out and return to me so I have a list and she/he has a list. Has people are added the list is updated.

5-Form 1006AF©2017- Tour Passengers Accommodations List (office use) (static)

◆This form is for keeping track of the tour group travelers sharing rooms. It has basic contact information for Primary passenger in each room. A copy of this list can be given to the tour operator if needed.

6-Form 1007AF©2017- Group PAX Flight List (office use) (static)

◆This form helps keep track of the flight information for each passenger in a group. It saves time from sorting through the paper work of the individual confirmations because some passengers may be on different flights. Detailed passenger info for your group is on this sheet. (For office use only).

7- Form 1009AF©2017- Rental Homes-Villas Quotes (client) (static)

◆This form is for a quick comparison between rental properties (Homes, Villas, Castles, etc.). It gives clients a few choices for rentals. I usually send three to four properties for them to look at and make a decision.

8- Form 1010AF©2017-Group Form for Cruise Line (office use) (static)

◆This form is for office use when planning a group cruise. All the useful information you will need to know about your group is on one sheet. This form is similar to the one used for Tour Operators/Groups.

BONUS FORM (Complimentary)

Letter: Why We Recommend Travel Insurance (client) (static)

◆This one page document is an explanation for clients as to why we recommend travel insurance, the benefits and risks. I created this to send out with the quotes and insurance brochures or if a client was on the fence about buying it. It helps a lot!

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Description of Forms

5-TA Office Administrative4_Financial Forms (office use) - Product ID TA-1400FF

The following forms are contained within this package. Once downloaded these forms, document 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 1406FF©2017- Client Refund (office use) (static)

◆ This form is used to issue a monetary refund to clients. It comes in handy when you least expect it. You never know when you may have to issue a refund.

2-Form 1402FF©2017- Client Invoice (Service Fees) (Client) (PDF-example) (static)

◆ This is the form I use to bill clients for my professional service fees. I send this invoice to my clients along with their travel documents and with my host agency's invoice from ClientBase. Before sending, I convert all the docs into a PDF format and send as a pdf portfolio package (so everything is together in one file).

3-Form 1403FF©2017- Agent Business Trip Budget (office use) (static)

◆ This document is to keep you on budget when planning your own trip whether a personal vacation or a FAM. Can use in conjunction with your agent's expense report. Part of your business financials.

4-Form 1404FF©2017- Agent Business Expense Report (office use) (static)

◆ This is a business expense report for independent travel agents. It comes in handy when reporting expenses for taxes. Plus, a nice tool for tracking how much you are spending and whether you are staying within your own travel budget on business trips.

5-Form 1405FF©2017- TA Commission-Service Fee Income Report_2017 (office use) (static)

◆ This form records your monthly income and automatically calculates and populates into a monthly summary to show year end totals. So you can see your annual income from sales, commissions and service fees. It is very useful for tracking both monthly and annual income all on one worksheet.

BONUS FORM (Complimentary)

6-Form 1406FF©2017- Inspection Report for Cruise Lines (office use) (static)

◆ This form can be used for inspecting and reviewing a cruise ship. Often you can receive CLIA credits for each cruise ship you inspect by submitting an inspection report. I created this handy report when I did not have anything else. Some cruise lines have their own inspection reports they will give to you when you board the ship, if not it is good to have this one on hand just in case.

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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.