

Planning + Process

CHECKLIST



TRAVEL
INVESTMENT
ADVISORS

- 1 You Will Meet With Your Travel Advisor For a Planning + Kickoff Meeting during which your advisor will advise the professional fee amount to move forward
- 2 You Will Pay the Agency Professional Fee + Sign the Travel Services Agreement
- 3 You Will Receive the Initial Proposal + Itinerary
- 4 You Will Provide Feedback to Travel Advisor on the Itinerary or Quotes
- 5 You Will Provide Your Travel Advisor Approval of the Final Itinerary and Travel Insurance Quote
- 6 You Will Complete the Traveler Information Forms, Sign the Travel Services Agreement and Travel Insurance Waiver, Pay the Trip Deposit and Travel Insurance
- 7 You Will Receive Supplier Invoices and Confirmation of Your Payments from Your Travel Advisor
- 8 You Will Get Payment Reminders, and Travel Tips From Your Travel Advisor
- 9 Your Travel Advisor Will Make Final Payments Per Agreed Upon Terms
- 10 You Will Review Your Final Travel Documents During Your Pre-departure Call or In Person meeting With Your Travel Advisor

Questions? Don't hesitate to call us at 843-279-0310.