
Reservation Form

File form checklist - check off below as forms are added to Client file

Credit Card Authorization

Report Sale

Thank You Letter

Travel Protection Waiver

Accounting Tools Invoice Number

Welcome Home Letter

Confirmation from vendor

Documents sent to client

Client(s) Information

Full Legal Name (First, Middle, Last)

Full Legal Name (First, Middle, Last)

Date of Birth

Date of Birth

Street address

Street address line 2

City

State

Zip code

E-mail address

Phone Number

Travel Dates

Destination

Preferred Cruise Line or Resort

Airport
Transfers?

Travel
Protection?

Yes

Yes

No

*No

Flights Needed?

**Need signed waiver*

Yes

No

If yes, from what city?

Special Requests (Cabin Type, Room Type, Location, etc.)

Budget

Celebrating a Special Occasion

Medical or Allergy Information

Emergency Contact Person

Phone Number

Additional Information

Deposit Amount

Date Due

Final Payment Amount

Date Due

Vendor

Confirmation #

Commission

Passport Information

Passenger 1

Passenger 2

Passport Number

Passport Number

Issue Date

Issue Date

Expiration Date

Expiration Date