

Thank you for choosing Atlas and Anchor Travel. Complete as much information as possible so your recommendations can be tailored to your travel style, interests, and

### 1. PRIMARY CONTACT

Full name

Preferred name

Email address

Phone number

Preferred contact method

☐ Email

☐ Phone

☐ Text

Best days/times to contact you

### 2. TRIP OVERVIEW

What type of vacation are you considering?

☐ Ocean cruise

☐ River cruise

☐ All-inclusive resort

☐ Europe

☐ Alaska

☐ Hawaii

☐ Disney

☐ Guided tour

☐ Custom vacation

☐ Weekend getaway

☐ Group travel

☐ Other

Destination(s) you are considering

Departure airport

Preferred departure date

Preferred return date

Are your dates flexible?

☐ Yes

☐ No

☐ Somewhat

Preferred trip length

Nearby airports you would consider

Special occasion or reason for travel

### 3. BUDGET

Ideal vacation budget

Maximum comfortable budget

Budget represents

☐ Total trip

☐ Per person

☐ Not sure - please advise

Include in budget

☐ Flights

☐ Hotel/resort

☐ Cruise

☐ Transfers

☐ Excursions

☐ Travel protection

### 4. EXPERIENCES AND INTERESTS

Select everything that sounds appealing

☐ Relaxation

☐ Luxury

☐ Adventure

☐ Beach

☐ Mountains

☐ Food and wine

☐ Culture and history

☐ Museums

☐ Nature

☐ Wildlife

☐ Shopping

☐ Spa and wellness

☐ Nightlife

☐ Local experiences

☐ Photography

☐ Family activities

☐ Romance

☐ Adults only

☐ Bucket-list experiences

☐ Small towns

☐ Big cities

## 5. TRAVEL PARTY

Number of adults

Number of children

Children ages at time of travel

## TRAVELER 1

Full legal name

Date of birth

Email address

Phone number

Street address, city, state, ZIP/postal code

## TRAVELER 2

Full legal name

Date of birth

Email address

Phone number

Street address, city, state, ZIP/postal code

## TRAVELER 3

Full legal name

Date of birth

Email address

Phone number

Street address, city, state, ZIP/postal code

## TRAVELER 4

Full legal name

Date of birth

Email address

Phone number

Street address, city, state, ZIP/postal code

Additional travelers or notes about the travel party

## 6. ACCOMMODATIONS

Preferred hotel/resort brand

Preferred cruise line

Preferred lodging or cabin category

☐ Standard room☐ Ocean view☐ Balcony☐ Suite☐ Villa☐ Interior cabin☐ No preference

Bed configuration

☐ One king/queen☐ Two beds☐ Beds together☐ Beds separate☐ Connecting rooms☐ No preference

Number of rooms/cabins

Balcony required?

Other room, cabin, or location preferences

## 7. FLIGHTS AND TRANSPORTATION

Preferred airline

Frequent flyer number(s)

Preferred cabin

☐ Economy☐ Premium economy☐ Business☐ First class☐ Open to options

Flight preferences

☐ Nonstop strongly preferred☐ One stop is acceptable☐ Avoid overnight flights☐ Flexible times☐ Need seat assignments

Other flight or transportation preferences

## 8. DINING AND SPECIAL REQUIREMENTS

Dining preference

Celebration date

Dietary restrictions or food allergies

Accessibility, mobility, medical-device, or service-animal needs

Celebrating

☐ Birthday☐ Anniversary☐ Honeymoon☐ Retirement☐ Graduation☐ Family reunion☐ Other

## 9. PASSPORT AND INTERNATIONAL TRAVEL

Passport status

☐ All travelers have valid passports☐ Some travelers need passports☐ Not applicable☐ Unsure

Known passport expiration date(s)

Citizenship, residency, or visa considerations

## 10. TRAVEL PROTECTION

Would you like information about travel protection?

☐ Yes☐ No☐ Already covered☐ Please explain my options

## 11. YOUR DREAM VACATION

What would make this vacation unforgettable?

Must-do experiences or activities

Anything you want to avoid

Anything else your travel advisor should know?

## 12. HOW YOU FOUND US

How did you hear about Atlas and Anchor Travel?

☐ Referral☐ Social media☐ Website search☐ Returning client☐ Other

Name of person who referred you, if applicable

## 13. CLIENT ACKNOWLEDGMENT

Submitting this inquiry does not create a booking or guarantee pricing or availability. Prices and availability may change until payment is processed and confirmed by the travel supplier.

Please confirm

☐ I understand this is a planning inquiry, not a confirmed reservation.☐ I understand payment information will be requested separately through an approved secure method.

Electronic signature / typed name

Date

# ATLAS AND ANCHOR TRAVEL

Thoughtful planning. Memorable journeys.

## PRIVACY & COMMUNICATION NOTICE

Your personal information is collected solely for the purpose of researching, planning, booking, and servicing your travel arrangements. Atlas and Anchor Travel respects your privacy and does not sell or share your personal information except as necessary with travel suppliers and service providers to fulfill your travel requests.

By submitting this Travel Planning Profile, you authorize Atlas and Anchor Travel to contact you regarding your travel inquiry by your preferred communication method (email, phone, or text). You may opt out of marketing communications at any time.

## CLIENT ACKNOWLEDGMENT

By submitting this Travel Planning Profile, I understand that this is a planning inquiry only and does not create a reservation, guarantee pricing, or confirm availability. Travel pricing, promotions, and availability are subject to change until a reservation is confirmed and payment has been processed by the travel supplier.

I understand that Atlas and Anchor Travel acts solely as an independent travel advisor and makes reservations with third-party travel suppliers. I acknowledge that valid travel documentation, including passports, visas, vaccinations, and other entry requirements, is the responsibility of each traveler.

I understand that payment information will only be collected through an approved secure payment method and will never be requested through unsecured email.

I have reviewed the information provided on this form and certify that it is accurate to the best of my knowledge.

☐

I have read and understand the above acknowledgment.

Electronic Signature / Typed Name:

Date: