PROFESSIONAL CLIENT RESOURCE

The Savvy Traveler's Planning Guide

A practical framework for organizing a future trip before booking.



1

Define the trip priorities

Travel choices become easier when the preferred pace, activities, accessibility needs, and budget are clear.

Consider: Write down the experiences that matter most before comparing options.

2

Create a flexible itinerary

A schedule with breathing room can accommodate transportation delays, weather changes, and spontaneous opportunities.

Consider: Balance fixed reservations with unplanned time.

3

Confirm documents and protections

Entry documents, health requirements, cancellation terms, and travel protections vary by destination and provider.

Consider: Verify current requirements and read provider terms before committing.

Use the guide as a conversation starter

Write down questions as you review the material. The client or an appropriate qualified professional can confirm what applies to your circumstances.



4

Review Protection and Change Terms

Compare cancellation, change, insurance, and supplier terms before committing funds.

> **Consider:** Ask which charges are refundable and which are controlled by third parties.

5

Prepare Essential Documents

Check identification, passport, visa, health, and entry requirements through authoritative sources.

> **Consider:** Reconfirm requirements close to departure because conditions can change.



Your Practical Checklist

- ☐ Define the preferred destination and travel pace.
- ☐ Check current entry and identification requirements.
- ☐ Leave room in the itinerary for delays and rest.
- ☐ Set a realistic trip budget and priority list.
- ☐ Review cancellation and change terms before booking.
- ☐ Keep reservations and emergency contacts accessible.

> **Notice** what changed or needs clarification.

> **Organize** the records connected to each question.

> **Confirm** current requirements with the right professional.

Questions and notes

Record dates, records, and details to confirm during the next conversation.

YOUR NEXT STEP

Ready to discuss the next step?

Use the secure EZ Travel Agency LLC funnel to request information. The client will confirm services, availability, and situation-specific requirements directly.

Open the secure client funnel →

Bring useful questions

01 Organize the records you already have.
02 Note what you want the client to clarify.
03 Confirm current requirements before acting.

This guide is provided for educational purposes only. Travel conditions, pricing, and availability are subject to change. For personalized travel planning assistance, consult with a professional travel advisor.

