

# Vacation Planning Guide



Grab a glass of wine, your travel sidekicks and let's plan an adventure!

# Worksheet 1: Choosing Your Trip

First things first, you need to pick your destination before the rest of your trip can come together. Too many options to pick from or completely stumped on where to go next? This short questionnaire can help you zoom in on some options!

## Question 1: What type of trip are you planning?

Family Trip

Couples Trip

Boys/Girls Trip

Romantic Getaway

Other:

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Notes:

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## Question 2: What is the length of the trip?

Weekend/Long Weekend

Week

2 Weeks or longer

Other:

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Notes:

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### Question 3: What type of locations(s) are preferred?

*(Check all that apply)*

City

Small Town

Mountains

Beach

Other:

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Notes:

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### Question 4: What are the region preferences?

*(Check all that apply)*

Africa (ex: Marrakesh, South Africa, Egypt, Kenya, Tanzania)

Asia (ex: Bali, Thailand, Philippines, Myanmar, Indonesia)

North America (ex: USA, Canada, Mexico, Bermuda)

South America (ex: Brazil, Argentina, Chile)

Central America (ex: Guatemala, Honduras, Nicaragua, Belize)

Caribbean (ex: Aruba, Cuba, Barbados, Virgin Islands)

Western Europe (ex: France, Germany, Switzerland, Spain, UK)

Eastern Europe (ex: Czech Republic, Hungary, Poland, Russia)

Middle East (ex: Israel, Dubai, Turkey)

Specific Country (I know where I want to go!)

## Question 5: What are the weather and timing preferences?

*(Check all that apply)*

- |                                       |                                       |
|---------------------------------------|---------------------------------------|
| <input type="checkbox"/> Warm Weather | <input type="checkbox"/> Cold Weather |
| <input type="checkbox"/> Summer       | <input type="checkbox"/> Fall         |
| <input type="checkbox"/> Spring       | <input type="checkbox"/> Winter       |
| <input type="checkbox"/> High Season  | <input type="checkbox"/> Low Season   |

Notes:

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## Question 6: What type of accommodations are preferred?

*(Check all that apply)*

- |   |                                      |
|---|--------------------------------------|
| <input type="checkbox"/> All-inclusive Resort                                     | <input type="checkbox"/> Cruise      |
| <input type="checkbox"/> AirBnb   | <input type="checkbox"/> Hotel/Motel |
| <input type="checkbox"/> Adventure (camping, camping car, tree house, boat, etc.) |                                      |
| <input type="checkbox"/> Other :  |                                      |

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Notes:

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## Question 7: What types of experiences are you interested in?

*(Check all that apply)*

- Road Tripping
- Relaxing in one place
- Adventure Seeking: hiking, biking, yoga, backpacking, etc.
- Relaxing: spa, pool, reading, etc.
- Cultural Activities: museums, historic monuments, theatre, etc.
- Foodie Experience: food tours, unique local cuisine, cooking courses, wineries, distilleries, etc.
- Educational Experience: learning a new skill or hobby such as a foreign language or organic farming
- Fashion & Shopping: checking out the latest in the fashion world
- Other

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Notes:

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## Question 8: What is the budget?

- Luxury: Going all out and expenses are not a primary concern
- Comfort: Travel in relative comfort but no need to be extravagant
- Budget: Watching the dollars and it's more about the experiences
- Other

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Notes:

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Ok, interrogation over! But you should now be able to complete a quick narrative of your desired vacation to help with researching and selecting your destination.

*Example: We are going on a family trip for 2 weeks in Europe when it is warm. We would like to primarily experience small villages with a mix of activities including biking, museums, and local cuisine. To help control our comfort level budget we prefer to stay in AirBnb's where we can have more flexibility, including the option to cook.*

Create your vacation narrative:

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# Worksheet 2: International Travel Document Requirements

Before booking a trip abroad verify the travel document requirements. And be sure there is plenty of time to get your documents in order before your departure date.

Destination: \_\_\_\_\_

Passport Requirements (inc. expiration):

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Visa Requirements:

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Immunization Requirements:

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## Worksheet 3: Creating a Budget

Budgeting can help with ensuring a smooth vacation. It helps when making decisions on where to spend money, setting trip expense expectations, and alleviating the stress of coming back to a higher than expected credit card bill.

### Transportation:

Arrival/Departure (plane, train car)	\$ _____
Destination	
Car & gas	\$ _____
Public transportation	\$ _____
Plane/train tickets	\$ _____

### Accommodations:

Place 1: _____	\$ _____
Place 2: _____	\$ _____
Place 3: _____	\$ _____

### Food & Alcohol:

# of Days: \_\_\_\_\_ x \$ per day: \_\_\_\_\_ = \$ \_\_\_\_\_

### Entertainment/Activities:

Activity 1: _____	\$ _____
Activity 2: _____	\$ _____
Activity 3: _____	\$ _____
Activity 4: _____	\$ _____
Activity 5: _____	\$ _____

### Other Expenses:

Cell Phone Plan: _____	\$ _____
Souvenirs: _____	\$ _____
Other Expense 1: _____	\$ _____
Other Expense 2: _____	\$ _____
Other Expense 3: _____	\$ _____

Total Expected Expenses: \$ \_\_\_\_\_



## Worksheet 4: Creating an Itinerary

Creating a flexible itinerary will help with buying advance tickets and making sure that you get in everything on your final list. However, flexibility is the key word since the unexpected can always pop up!

Day 1:

Time of Arrival: \_\_\_\_\_

Activity 1: \_\_\_\_\_ time: \_\_\_\_\_

Activity 2: \_\_\_\_\_ time: \_\_\_\_\_

Activity 3: \_\_\_\_\_ time: \_\_\_\_\_

Accommodation: \_\_\_\_\_

Day 2:

Activity 1: \_\_\_\_\_ time: \_\_\_\_\_

Activity 2: \_\_\_\_\_ time: \_\_\_\_\_

Activity 3: \_\_\_\_\_ time: \_\_\_\_\_

Accommodation: \_\_\_\_\_

Day 3:

Activity 1: \_\_\_\_\_ time: \_\_\_\_\_

Activity 2: \_\_\_\_\_ time: \_\_\_\_\_

Activity 3: \_\_\_\_\_ time: \_\_\_\_\_

Accommodation: \_\_\_\_\_

Day 4:

Activity 1: \_\_\_\_\_ time: \_\_\_\_\_

Activity 2: \_\_\_\_\_ time: \_\_\_\_\_

Activity 3: \_\_\_\_\_ time: \_\_\_\_\_

Accommodation: \_\_\_\_\_

Day 5:

Activity 1: \_\_\_\_\_ time: \_\_\_\_\_

Activity 2: \_\_\_\_\_ time: \_\_\_\_\_

Activity 3: \_\_\_\_\_ time: \_\_\_\_\_

Accommodation: \_\_\_\_\_

*(Re-print this page as needed)*

Day \_\_\_\_:

Time of Arrival:

Activity 1: \_\_\_\_\_ time: \_\_\_\_\_

Activity 2: \_\_\_\_\_ time: \_\_\_\_\_

Activity 3: \_\_\_\_\_ time: \_\_\_\_\_

Accommodation: \_\_\_\_\_

Day \_\_\_\_:

Activity 1: \_\_\_\_\_ time: \_\_\_\_\_

Activity 2: \_\_\_\_\_ time: \_\_\_\_\_

Activity 3: \_\_\_\_\_ time: \_\_\_\_\_

Accommodation: \_\_\_\_\_

Day \_\_\_\_:

Activity 1: \_\_\_\_\_ time: \_\_\_\_\_

Activity 2: \_\_\_\_\_ time: \_\_\_\_\_

Activity 3: \_\_\_\_\_ time: \_\_\_\_\_

Accommodation: \_\_\_\_\_

Day \_\_\_\_:

Activity 1: \_\_\_\_\_ time: \_\_\_\_\_

Activity 2: \_\_\_\_\_ time: \_\_\_\_\_

Activity 3: \_\_\_\_\_ time: \_\_\_\_\_

Accommodation: \_\_\_\_\_

Day \_\_\_\_:

Activity 1: \_\_\_\_\_ time: \_\_\_\_\_

Activity 2: \_\_\_\_\_ time: \_\_\_\_\_

Activity 3: \_\_\_\_\_ time: \_\_\_\_\_

Accommodation: \_\_\_\_\_

## Worksheet 5: Destination Tid-Bits

Creating a little cheat sheet of logistics and details can be super beneficial when packing and being more prepared when you arrive.

Weather:

Average: \_\_\_\_\_

High: \_\_\_\_\_

Low: \_\_\_\_\_

Climate (rainy, sun, etc.): \_\_\_\_\_

Daylight:

Sunrise: \_\_\_\_\_

Sunset: \_\_\_\_\_

Currency:

Local currency: \_\_\_\_\_

Exchange rate: \_\_\_\_\_

Electric Currency: \_\_\_\_\_

Each destination is unique so jot down any other important tid-bits that would be helpful to remember:

Other 1: \_\_\_\_\_

Other 2: \_\_\_\_\_

Other 3: \_\_\_\_\_

Other 4: \_\_\_\_\_

## Worksheet 6: Planning Checklist

Like any good planner, it feels good to put a check on this list when done!

- | <u>Yes</u>               | <u>N/A</u>               |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Destination selected                        |
| <input type="checkbox"/> | <input type="checkbox"/> | Passport complete                           |
| <input type="checkbox"/> | <input type="checkbox"/> | Visa complete                               |
| <input type="checkbox"/> | <input type="checkbox"/> | Immunizations complete                      |
| <input type="checkbox"/> | <input type="checkbox"/> | Budget created                              |
| <input type="checkbox"/> | <input type="checkbox"/> | Arrival and departure transportation booked |
| <input type="checkbox"/> | <input type="checkbox"/> | Destination transportation booked           |
| <input type="checkbox"/> | <input type="checkbox"/> | Accommodations booked                       |
| <input type="checkbox"/> | <input type="checkbox"/> | Activities/entertainment booked             |
| <input type="checkbox"/> | <input type="checkbox"/> | Other: _____                                |
| <input type="checkbox"/> | <input type="checkbox"/> | Other: _____                                |
| <input type="checkbox"/> | <input type="checkbox"/> | Other: _____                                |

*Boy Voyage!*