



Vacation Planning Worksheet

Use this worksheet to turn your ideas into a travel plan. Complete what you know and leave undecided items for your planning conversation.

Primary contact: _____

Preferred contact method and details: _____

Destination ideas: _____

Departure date: _____ Return date: _____ Nights: _____

Date flexibility: _____ Departure city or airport: _____

Who is traveling

Traveler name	Adult or child and age at travel	Room or cabin grouping

Add another page for a larger party. Share passport numbers and payment details only through the appropriate booking process.

The vacation you want

☐ Cruise ☐ All-inclusive resort ☐ Beach ☐ Mountains ☐ City or culture
☐ Theme parks ☐ Guided tour ☐ Road trip ☐ Other: _____

Occasion or reason for travel: _____

Preferred pace: ☐ Relaxed ☐ Balanced ☐ Busy with activities

Top three experiences or priorities

Things to avoid and needs to discuss privately



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Build your trip budget

Budget applies to: ☐ Whole traveling party ☐ Per person Currency: _____

Comfortable total budget: _____ Maximum total: _____

Enter each cost once. If a package already includes an item, write "included" in that row. Add taxes and fees only where they are not already included.

Cost category	Estimated amount	Included or notes
Cruise, resort, tour, or lodging		
Flights or other long-distance travel		
Hotels before or after the main trip		
Transfers, rental car, fuel, tolls, parking		
Taxes and mandatory fees not included above		
Meals, drinks, and optional packages		
Gratuities and service charges		
Activities, excursions, and admission tickets		
Travel insurance		
Documents, visas, and entry permissions		
Baggage, internet, laundry, and purchases		
Contingency allowance		
TOTAL ESTIMATED TRIP COST		

Worth spending more on: _____ Ways to save: _____

Costs still to verify



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Accommodation and itinerary preferences

Where you want to stay

Rooms or cabins needed: _____ Bed preferences: _____

Preferred location or cabin type: _____

Essential amenities or accessibility features: _____

Meals or dining preferences: _____

Outline your itinerary

Date	Place or activity	Travel or booking notes

Activities to reserve and how much free time to leave

Transportation or timing questions



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Reservations and next steps

Track reservations and deadlines

Reservation or task	Due date	Paid or balance due	Status
Main trip deposit			
Final payment			
Flights and transfers			
Other booking or deadline			

Confirm before finalizing

- ☐ Names, dates, destinations, room arrangements, and total price are correct.
- ☐ Document, entry, accessibility, and special-request needs have been checked.
- ☐ Cancellation, refund, and change terms are understood for each booking.
- ☐ Insurance options and any purchase deadlines have been reviewed.
- ☐ Transportation connections and time buffers are workable.

Travel assistance contact: _____

Emergency contact at home and phone: _____

Next action and target date

Ready to work through the remaining details? Visit jkatravel.com.