

# TravelWizzy CLIENT INTAKE FORM

Date: \_\_\_\_\_

## TRAVEL INFORMATION

Client Name: \_\_\_\_\_ Phone: \_\_\_\_\_  
Address: \_\_\_\_\_ Email: \_\_\_\_\_  
Dates of Travel: \_\_\_\_\_ Dates Flexible?: \_\_\_\_\_  
Destination: \_\_\_\_\_ # of Travelers: \_\_\_\_\_  
Children/Ages: \_\_\_\_\_ Budget: \_\_\_\_\_

## AIR TRAVEL

Departure City: \_\_\_\_\_ Airline: \_\_\_\_\_  
Class Preference:  Basic  Economy  Business  First  
Seat Preference:  Window  Middle  Aisle  No Preference  
Departure Time:  Morning  Afternoon  Evening  No Preference  
Luggage: \_\_\_\_\_ Loyalty Rewards: \_\_\_\_\_

## CRUISE VACATION

Cruise Preference: \_\_\_\_\_ Length: \_\_\_\_\_  
Class Preference:  Stateroom  Balcony  Oceanview  Suite  
Deck Preference:  Low  Mid  High Number of Cabins: \_\_\_\_\_  
Departure Time:  Morning  Afternoon  Evening  No Preference  
Other: \_\_\_\_\_

## HOTEL AND RESORT VACATION

Hotel Preference: \_\_\_\_\_ # Nights: \_\_\_\_\_  
Bed Size(s): \_\_\_\_\_ # Rooms: \_\_\_\_\_  
Room Type:  Standard  Suite  Penthouse  Villa  
Features:  All-Inclusive  Adults Only  Family Friendly  Luxury  
 LGBTQIA  Beach  Casino  City  
 Kids Club  Activities On-Site  Romantic  Budget  
Room View:  Garden View  City View  Oceanview  Oceanside  
Things You Would Like To Do: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## CAR RENTAL AND INSURANCE

Rental Car/Company: \_\_\_\_\_ Airline: \_\_\_\_\_  
Car Type:  Compact  Mid-Size/Full  SUV  Premium  Other  
Travel Insurance:  Yes  No  Undecided \_\_\_\_\_