



## NEW CLIENT QUESTIONNAIRE

Please take a few moments to complete the information requested below.  
Brief answers are fine. Use the back of these sheets if you would like to provide more information.

Involve your entire household. Have fun telling us about your wants and needs.  
We would like to take full advantage of the time we share together and your input is essential.

Thank you for your cooperation. All information will be kept confidential.

PRIMARY CONTACT INFORMATION: Date:

Address:

City:

CONTACT #1:

Name:

Day Phone:

Evening Phone:

Fax:

Cell:

E-Mail:

CONTACT #2:

Name:

Day Phone:

Evening Phone:

Fax:

Cell:

E-mail:

How would you prefer to be contacted? (Check all that apply)

Work Phone Home Phone E-mail Cell Day Eve

Part I HOTEL INFORMATION

Rooms required: \_\_\_\_\_ Type of Room for client: \_\_\_\_\_ Type of room for associates: \_\_\_\_\_

# Bedrooms: \_\_\_\_\_ # Baths: \_\_\_\_\_

What floor preference? \_\_\_\_\_

Do you prefer to be located near associates or not? \_\_\_\_\_

How long you traveled and what is your most pleasurable travel experience?

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What is your least favorite travel experience and how we can assist in making your travel most pleasurable?

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Do you have plans for increasing your current level of travel? Will your preferences need to serve different functions in the future?

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Do you travel with any pets? Please list type, age, special needs:

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Special Considerations – Check any that apply:

Disabled, elderly or young children traveling?

Are any travelers daytime sleepers?

#### LIFESTYLE

#### ENTERTAINING:

Our entertaining style is:

None when traveling \_\_\_\_\_

Formal (dining reservation required) \_\_\_\_\_

Informal (prefer to dine on own)

Combination (dine on own and reservation arranged)

Average guests:

Adults              Teenagers              Children              All ages              High

profile (special considerations need to be taken)

Entertaining Type:

Do you have plans for increasing your current level of travel? Will your preferences need to serve different functions in the future?

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MEALS: What culinary facilities are required? Circle one or more:

Culinary choices are extremely important for our clientele and we ensure proper culinary choices are met with the utmost quality and consistency.

Average              above              Average              Elaborate

Vegan              Vegetarian              Flexitarian              Macro Biotic Diet              Gluten  
Kosher

Does one require or travel with a personal chef? Yes / No

Where do you eat your meals?

Privately in room or will we be making reservations \_\_\_\_\_

MAINTENANCE:

How many hours per week will be devoted to traveling?

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Do you require exercise facilities? Yes / No

Do you require a conference room or media room?

Yes / No

If yes, is an area needed to accommodate how many people?

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Do you have any special requirements?

If yes, please list-

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Do you require additional security? Yes / No

If you circled yes, do you arrange or does Palm Beach Travel?

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Hobbies:

Reading

T.V.

Home Theater

Entertaining

Music

Sports

Cooking

Fitness

Other \_\_\_\_\_

What are your technical needs?

Computers Surround Sound Other \_\_\_\_\_

Wireless DSL/Satellite Home Theater \_\_\_\_\_

Conference Room \_\_\_\_\_

Are you looking to create a children's play area? Yes / No

TRAVEL OFFICE:

Does any household member work while traveling? Yes / No

If yes, are there any special needs (i.e., lighting, soundproofing, computers, etc.)?

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Does there need to be a designated area for working while traveling? Yes / No

VACATION TIME:

We stay at home for our rest/relaxation: All the time Some of the time Rarely

We travel for rest and relaxation: All the time Some of the time Rarely

We Travel for business: All the time Some of the time Rarely

We travel for a combination of all: All the time Some of the time Rarely

We travel for our vacations: Domestically or Internationally or both?

Part II PROJECT INFORMATION

Person(s) responsible for travel decisions: \_\_\_\_\_

What is the budget for your monthly travel booked by Palm Beach Travel?

- \$5,000 – 10,000  \$10,000 - \$30,000
- \$40,000 - \$90,000  \$100,000 – \$200,000
- Other \_\_\_\_\_

The Travel planning is to be done: All at one time Monthly Weekly  
Daily As Needed

Will travelers be available for consultation or will assistants or associates authorized to make decisions on the clients behalf?

Priorities:

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Please “X” next to the priorities of travelers preferences...

Our traveler's preferences are the utmost importance to Palm Beach Travel. We personally ensure that all requests are met.

First Class for clients and immediate family

First Class/Business class for associates  
Premium Economy or economy for associates  
Vegan meals  
Kosher meals  
Gluten Free meals  
Vegetarian meals  
Flexitarian meals  
other (please note further information will be required)

Preferred Airlines:

Palm Beach Travel specializes in airline mileage tickets. Do you have frequent flyer accounts we can utilize for your travel?

American Express Status:

Centurion\_\_\_\_\_ (please note team assigned with American Express if applicable)

Platinum\_\_\_\_\_

What amount of travel arrangements would Palm Beach Travel anticipate making for you within the next 12 months?

What is your favorite hotel? \_\_\_\_\_

Why? \_\_\_\_\_

What don't you like about your current travel agency? \_\_\_\_\_

Why? \_\_\_\_\_

What do you like?  
\_\_\_\_\_

Where do you travel the most? \_\_\_\_\_

What part of traveling do you like the least? \_\_\_\_\_

Are there any specific requirements that you must have to have while traveling?

Please explain:  
\_\_\_\_\_  
\_\_\_\_\_

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Are there any situations that we can avoid while traveling ?

Please explain:

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How involved do you wish to be in this travel: (Please check)

Very involved (Call you with details and updates daily or weekly)

Involved – An assistant(s) will keep you updated (Keep you updated with dates, itineraries, schedule etc.)

Minimally involved – don't call until travel is confirmed

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

What is your “ideal” working relationship with Palm Beach Travel

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### PART III TRAVEL PREFERENCES

#### Travel Goals

Prioritize the following personal travel goals from 1-3, with 1 being your most important quality.

\_\_\_\_\_ I am interested in achieving a more peaceful and consistent travel experience

\_\_\_\_\_ I want my travel to function more effectively for my lifestyle.

\_\_\_\_\_ I want my travel plans to better reflect my personal tastes and my specific requirements be assured.

Other \_\_\_\_\_

Would you like to include “green or environmentally friendly hotels or travel products” when possible?

Yes No

What do you mean?

What hotel “feeling” are you seeking to achieve?

Casual Formal Spacious Clean lines Warm/ cozy

Light/airy Elegant Sophisticated “Lived in” Welcoming

Romantic Contemporary

Environmentally friendly

Have you ever hired a professional travel planner before? Circle Yes / No  
If yes, when did this take place, and were you pleased with the experience  
and the results:

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Please scan and email this completed form to  
[Annie@mypalmbeachtravel.com](mailto:Annie@mypalmbeachtravel.com)