



UNIVERSAL Client Questionnaire

Thank you for choosing me as your Universal Travel Advisor!

Before our consultation call, please fill out the following worksheets and *email* them back to me. This will help to guide our conversation and serve as a reference point for my planning and booking!

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Intake Form

NAME:

EMAIL:

ADDRESS:

PHONE:

Where are you in the planning process?

What are your travel dates? Are they flexible?

What airport do you prefer to depart from?

Who all is coming on this trip? Who will be making final decisions about pricing, dates, and accommodations?

What parks are you hoping to experience while you are in Universal?

Universal Travel Goals

PRIMARY TRAVEL GOALS

Everyone travels differently! Please take a few moments to fill out this survey and "paint the picture" of what your expectations, needs, hopes, and wishes are for this vacation!

01 Tell me the story and vision behind this vacation. Why Universal? Why right now?

02 Tell me about your favorite vacation you've ever taken as a family/group, and why it was your favorite?

03 Tell me about your *least* favorite vacation you've ever taken as a family/group, and why it was your *least* favorite.

About Your Family/Group

What are your favorite activities to do together?

Have you taken a trip like this before?

What types of hotels and accommodations do you typically prefer?

What are the ages of everyone at the time of travel?

Adults:

Children:

Who is everyone's favorite Universal character?

How tall are the children?

Questionnaire

Does anyone coming on this trip have any mobility issues I should be aware of?

Does anyone coming on this trip have any dietary issue I should be aware of?

Does anyone coming on this trip have any social, emotional, or sensory concerns I should be aware of?

What budget do you have in mind for the entirety of your trip?

What is the most important memory or moment you would like to have happen on this trip?

Notes
