



**New Client Intake Form  
Platinum Travel Insiders, LLC**

**PRIMARY CONTACT INFORMATION:**

**Name:**

**Date:**

**Address:**

**City, State, Zip:**

**Email:**

**PASSENGER INFORMATION:**

**All Information provided here is TSA Info and needs to match your passports EXACTLY as it will be used for air records.**

**Lead Passenger:**

Name:

Date of Birth:

Global Entry No.:

Airline Reward No.'s: (please specify each Airline / Reward No. separately):

Day Time Phone:

Cell Phone:

Preferred Number of Contact:

Email:

**Additional Passengers: (please provide email of those you would like included in correspondence:**

1.) Name:

Date of Birth:

Global Entry No.:

Airline Reward No.'s: (please specify each Airline / Reward No. separately):

**Additional Passengers: (please provide email of those you would like included in correspondence (continued)):**

2.) Name:

Date of Birth:

Global Entry No.:

Airline Reward No.'s: (please specify each Airline / Reward No. separately):

**Add Additional Fields for the above as necessary.**

**TRIP INFORMATION:**

**Special Occasion:**

What type?

Date of Special Occasion:

**Dates:**

Dates of Travel:

No. of Nights Requested for Stay:

Flexibility in those Dates / Nights of Stay:

Earliest available Departure Date:

Latest available Return Date:

**Location:**

Open to Alternative Locations:      Yes              No

Caribbean:

Hawaii:

South Pacific:

**FLIGHTS:**

**Private / Commercial:**

**Airline Preference:**

**Preferred Class of Service:**

**Departure / Return Airport Gateway:**

Departing from:

Returning to:

**Preferred Time of Departure:**

**Preferred Time of Return:**

**PLEASE MAKE SURE ALL FREQUENT FLYER ACCOUNTS ARE LISTED PREVIOUSLY**

**LODGING / ACCOMMODATIONS:**

**Favorite Hotel You've Ever Stayed in Anywhere?**

**Favorite Chain Hotel?**

**Hotel Atmosphere you are looking for?**

Casual:            Home-Like:            Warm / Cozy:            Formal:            Spacious:  
Modern:            Light & Bright:            Elegant:            Sophisticated:            Romantic:  
Green (Environmentally Friendly):            Contemporary:            Indigenous to Locale:

**Accommodation Location:**

Centrally Located (closer to town / walk to restaurants):            Yes            No  
More Remote / Quieter Location:            Yes            No

**Suite Location on Property:**

Ocean Front:            Ocean View:            Garden View:

**Number of Bedrooms Required:**

**Number of Bathrooms Required:**

**Floor Preference:**

**Location in Comparison to Others in Your Group:**

**Briefly Describe Favorite & Least Favorite Past Travel Experiences:**

**Locations & Properties:**

**Why:**

**Travel w/ Pets: List age, type, special needs:**

**Is anyone in your party have mobility issues or special needs? Elderly, young children?**

**ON-SITE STAFFING:**

Will you be requiring any of the following staffing options:

Private Driver:      Personal Security:      Butler:      Private Chef:

Au Pair / Babysitting:      Dawn Perry On-Site Admin:( per diem):      Personal Trainer:

**LIFESTYLE ENTERTAINING:**

**Dining Preferences: Indicate percentages next to each category to total 100 percent**

- a.) Formal (not type of dress ~ but dining reservations required):
- b.) En Suite ~ In your accommodation w/ either villa stocking or private chef:
- c.) Informal ~ Casual atmosphere (some of my favorite “local spots”):
- d.) On Own ~ prefer to explore on your own:

**En Suite Provisions:**

Would you prefer your villa stocked prior to arrival?

Market / Beverage Lists requested two weeks prior to arrival

**Do you plan on or are you considering High Profile Entertaining      YES      NO**  
**(special considerations are taken to ensure location and event are successful)**

**Meals:**

Culinary choices are extremely important to our clientele. We ensure that proper culinary choices are met with utmost quality and consistency.

En Suite Culinary facilities required?

Average      Above Average      Professional Grade

Dietary Preferences: Check next to category / list name under category

Vegan:      Vegetarian:      Flexitarian:      Pescatarian:      Macrobiotic:

Gluten Free:      Whole Foods:      Kosher:      Juicing:

Client(s) names listed above in each category:

Allergies: Please list each client by name with their specific allergy and allergy level

**MAINTENANCE:**

**Health:**

Do you require specific exercise facilities? If so, please list equipment needed:

**Trainers:**

What type of personal trainers are you interested in?

How often:                                      Session Length:                                      On site:    Yes        No

**WORK HABITS:**

**Does any household member work while traveling?**

**If so, will you be requiring dedicated office space?                                      Equipment?**  
Conference Room?                                      Media Room?                                      How Many to Accommodate?  
Length of Time:                                      Days:  
Any additional security needed during this time frame?

**Any special equipment needed on site?**

Recording Studio                                      Lighting                                      Soundproofing                                      Computers  
Printers                                      Wireless Connectivity                                      Surround Sound                                      Black-Out Shading

Other: Please specify:

**HOBBIES / EXCURSIONS / INTERESTS FOR ITINERARY PURPOSES:**

**Water Sports: (check each option individually)**

Diving        Snorkeling        Reef Fishing        Deep Sea Fishing        KiteBoarding

Paddle Boarding        Kayaking        Day Tours to Alternative Islands in TCI

Culinary Adventures

**Diving:**

Are you PADI Certified (Certification Current):    Yes        No    Certification Level:

Renting Equipment (if so, detail equipment needed and sizing):

**TRAVEL HABITS / VACATION TIME:**

**How frequently do you travel for leisure in this capacity:**

**Is most vacation travel done:**

**Internationally?                                      Domestically?                                      Combination?**

**Level of Service Required:**

**How frequently do adults in party travel for business:**

**How often have the participants in this trip traveled together prior?**

**CURRENT TRAVEL PROJECT INFORMATION:**

**Person(s) responsible for travel decisions / planning on this trip:**

**Please name any Administrative Assistants or Associates that are authorized to execute decisions on traveler's behalf:**

**Is any part of this Itinerary a surprise?**

**What is the budget you have allotted for this particular Itinerary?**

**What Itinerary Components are you including in this budget amount?**

**Flights:      Hotel:      Travel Insurance:      Transfers:      Meals:      Excursions:**

**Car Rental:**

**Do you plan on using our Strategic Point Base Plan Services to best utilize your Pay with Point Redemption?**

**TRAVEL PLANNING & GOALS:**

**Please prioritize personal travel goals from 1 - 4 (1 is most important quality):**

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

It is important that we have consistent, available assistance during our travel experience

Travel function should effectively reflect consistently our lifestyle, personal tastes

Cost & Value are of great concern

**TRAVEL PLANNERS:**

Have you ever worked with Amex Travel Insider Program before?

With whom?

To where?

When?

Have you ever utilized the services of any Travel Planner?

If so, when?

Were you pleased with the experience created for you and the results of their efforts?

YES

NO

Do you have any additional comments or information that you feel might be helpful prior to our planning sessions?

Thank you for taking the time to complete this rather lengthy (yes, we know) survey. However, each component allows us to get you one step closer to your exact specifications in your travel planning.

We are excited to begin this process for you, and are confident that we are able to create An experience that will provide wonderful memories for years to come.

Warmly,

Dawn