

INVESTING TRAVELS

DOWNLOADABLE PLANNING WORKBOOK

Complete Travel Planning Checklist

Route, budget, bookings, insurance and departure preparation

Practical information only - verify legal, medical, tax and insurance decisions independently.

How to use this checklist

Work through each section before making nonrefundable commitments. Mark completed items, record questions and keep the checklist with copies of important documents.

1. Trip purpose and priorities

☐	Write the main reason for the trip in one sentence.	Notes: _____
☐	Choose the three experiences that matter most.	Notes: _____
☐	Identify mobility, dietary, medical or accessibility needs.	Notes: _____
☐	Decide which parts should remain flexible.	Notes: _____

2. Route and timing

☐	Check climate, holidays, closures and peak-season pressure.	Notes: _____
☐	Build a route with realistic travel time between stops.	Notes: _____
☐	Avoid changing hotels too frequently.	Notes: _____
☐	Add buffer time before cruises, tours and international flights.	Notes: _____
☐	Verify passport validity and entry requirements.	Notes: _____

3. Budget and bookings

☐	Set a complete budget including taxes, tips and transfers.	Notes: _____
☐	Price flights, luggage, seats and positioning travel together.	Notes: _____
☐	Confirm cancellation terms before paying.	Notes: _____
☐	Track deposits, final-payment dates and refundable options.	Notes: _____
☐	Use points only when the redemption provides meaningful value.	Notes: _____

4. Health and protection

☐	Review travel insurance exclusions and medical limits.	Notes: _____
☐	Carry medication in original packaging with documentation.	Notes: _____
☐	Save emergency contacts and coverage numbers offline.	Notes: _____
☐	Check destination advisories and local emergency numbers.	Notes: _____
☐	Leave itinerary and document copies with a trusted contact.	Notes: _____

5. Technology and documents

☐	Download offline maps, confirmations and translation tools.	Notes: _____
☐	Use unique passwords and multifactor authentication.	Notes: _____
☐	Carry backup cards separately.	Notes: _____
☐	Save encrypted copies of passports and policies.	Notes: _____
☐	Confirm roaming, eSIM or local connectivity before departure.	Notes: _____

6. Final 72-hour check

☐	Reconfirm flights, lodging, tours and transfers.	Notes: _____
☐	Check weather and transportation disruptions.	Notes: _____
☐	Notify financial institutions if needed.	Notes: _____
☐	Charge devices and pack essential items in carry-on luggage.	Notes: _____
☐	Review the first arrival steps before leaving home.	Notes: _____

Your decision worksheet

Use this page to turn research into a clear decision. If an answer is uncertain, identify the professional, authority or provider that can verify it.

Decision	Your answer	Follow-up
Trip goal		Name the experience that defines success.
Destinations and nights		Reduce unnecessary transfers.
Total trip budget		Include a contingency amount.
Critical reservations		Book limited-capacity items first.
Insurance		Record policy and assistance numbers.
Entry requirements		Verify with official sources.
Emergency contacts		Store online and offline.
Flexible time		Protect room for rest and discovery.

Final decision: ☐ Proceed ☐ Research more ☐ Change plans ☐ Do not proceed

Additional notes

Important: This workbook is general educational information. Immigration, tax, healthcare, financial and insurance requirements change and depend on individual circumstances.