

# Planning Fee Agreement

Please complete this agreement before we begin planning. Your fee is credited toward your booking with Cruise & Beyond.  
Email: [cruiseandbeyond@gmail.com](mailto:cruiseandbeyond@gmail.com) | Web: [www.cruise-beyond.com](http://www.cruise-beyond.com)

## Client Information

Full Name (as on passport)

Email

Phone

Preferred Travel Dates

Travel Destination(s)

## Select Planning Tier

### Tier 1 — Essentials (\$50)

Includes: Simple research for 1 destination; up to 2 curated options; basic itinerary suggestions; email support & one revision.

### Tier 2 — Signature (\$100)

Includes: Detailed research (up to 2 destinations); up to 3 options; excursions & transfers quotes; insurance guidance & concierge reservations.

### Tier 3 — Black Label (\$200)

Includes: Full-service bespoke planning; unlimited refinements; concierge services; on-trip monitoring & assistance.

## Agreement Terms & Conditions

1. **Planning Fee Payment:** The planning fee is due before research and itinerary design begin.
2. **Credit Toward Booking:** If you book through Cruise & Beyond, your planning fee is credited toward your trip (or refunded upon full payment, as stated on invoice).
3. **Non-Refundable if No Booking:** If you choose not to proceed with booking, the planning fee is non-refundable and compensates professional planning time.
4. **Cancellations:** If the trip is canceled after booking, the planning fee is forfeited. Supplier penalties are governed by each supplier's policies.
5. **Proposal Validity:** Quotes are time-sensitive; to retain fee credit, bookings should be confirmed within 30 days of proposal unless otherwise noted.
6. **Scope Changes:** Significant scope changes may require an upgraded tier or additional fee; this will be discussed in advance.
7. **Authorization to Plan:** By signing below, you authorize Cruise & Beyond to research, design, and coordinate travel arrangements on your behalf.
8. **Privacy & Data Security:** We collect only necessary information and share it with suppliers solely to secure reservations. Sensitive payment data is never emailed.

9. **Acknowledgment & Consent:** You acknowledge that you have reviewed and accept these terms.

Cruise & Beyond • Planning Fee Agreement • Fillable PDF for client completion and your records.

Initials (acknowledgment)

Date