

## Portfolio Information Form

This is the information on which I base my research and plan your trip, which is why it is so long! Please print it and fill it out as completely and honestly as possible so that I can make your Bespoke Portfolio perfect. If you prefer I can also email it or post it to you. The personal details will remain confidential at all times.

Lead Name: .....

Preferred contact details: (please fill in all those appropriate)

Email: .....

Phone: .....

Fax: .....

Address: .....

Total number in party: ..... Adults: ..... Children: .....

Children's Ages: .....

Nationality: (please state if one or more of the party has a different nationality as this may affect visa/entry conditions etc)

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Travel Dates: .....

Flexible/ Midweek travel possible: (please state days preferred)

.....

Destination planned:

.....

OR any destination(s) that are definitely a 'no go':

.....

Short (4 hrs or less), Medium (4 -7 hours) or Long Haul (7 hrs +):

.....

# THE TRAVELLING MUM.CO.UK

Air/ Sea/ Land travel to destination: (consider if you suffer from motion sickness and whether this may affect your journey)

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Climate at destination: (Hot/ Warm/ Cold, Tropics/ Snow etc.)

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Activity Level: (relaxing/ activities available/ energetic etc. State here if you have a specific activity in mind you'd like to include.)

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Car Hire (if appropriate): .....

    Type of Licence held: .....

    Main driver's age:.....

Travel Insurance required: (for how many in party?) .....

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Pre-departure accommodation/ parking required:

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Accommodation preferences :( please tick as many as possible, adding any likes/dislikes e.g. 'hotel with connecting rooms')

Hotel: .....

Apartment: .....

Bungalow: .....

Villa: .....

Chalet: .....

Youth Hostel: .....

Mobile home/Static Van: .....

Static/Luxury Tent: .....

Camping: .....

Other: .....

Essential amenities: (please tick as many as possible and give details if necessary)

- Swimming Pool (heated/unheated): .....
- Beach (sea/lake): .....
- Scenery: .....
- Ski/ Sports Equipment hire: .....
- Spa: .....
- Kids Clubs: .....
- Babysitting: .....
- Baby Listening: .....
- Walking Distance to shops/bar/restaurant: .....
- Public Transport nearby: .....
- Car Hire available locally: .....
- Other: .....

**Cultural/Language confidence:** (this is basically about how comfortable you are dealing with different cultures and customs whilst travelling. In some countries tourists are 'hassled' which can be unnerving and unpleasant, especially for women. Things like having to drive on the other side of the road and not being able to drink alcohol can ruin your holiday if you don't know about them in advance. Safety issues are often different in other places – lack of child car seats and seat belts can be a key problem. Language confidence can be an issue if you want to travel to remote areas where your native tongue may not be spoken at all. Please pick one of the options below and add any particular likes or dislikes – there is no right answer!

~ Comfortable in any situation, adopt a 'local' attitude and pick up key phrases easily if necessary:

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~ Comfortable in most situations, don't mind feeling a bit worried at times and probably won't stray too far from the 'beaten track':

.....

~ Comfortable in familiar situations, where most of the travel will be similar to that at home, leaving me confident to relax and enjoy:

.....

# thetravellingmum.co.uk

Specifically about you: (this is where you tell me anything else I need to know about you as future travellers. It includes any medical conditions that may influence your trip and maybe also how you feel about preventative treatment for diseases such as malaria, typhoid and hepatitis.

Would you like to take your pets away with you? Is there somewhere specific you'd like to incorporate into your trip? Is it a special occasion or celebration? Make it personal and let me do the rest...)

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Total Maximum Budget: (include everything that you want me to help with, and rest assured that maximum means exactly that – it'll all add up to that figure.)

.....

Calculate 5% : .....

Call 07722 536925 or email me ([thetravellingmum@hotmail.co.uk](mailto:thetravellingmum@hotmail.co.uk)) for details of where to send your completed form.

I look forward to hearing from you!

Rachel Edmeads

Please note: Portfolio Information Forms are confidential and require only the Lead Name and contact details. All personal details will remain confidential at all times. Personal details will be never be passed on to any Third Party. The Bespoke Portfolios and Destination Guides supplied by Rachel Edmeads are for information purposes only and clients are advised that no liability is afforded. Information contained in Portfolios and Destination Guides is correct at time of issue and Rachel Edmeads cannot be held responsible for any changes in the information that occur after that time. Rachel Edmeads is NOT a Travel Agent, and is not affiliated to or compensated by any of the businesses or persons mentioned in Portfolios or Guides.

## Terms and Conditions

**The Business:** Rachel Edmeads provides a fee-based advice, research and consultancy service.

**The role and function of Rachel Edmeads is limited to the following:**

- Exploring the client's requirements
- Researching of options on client's behalf
- Advising the client
- Assisting clients through the reservation procedure
- Going through the travel or other supplier's terms and conditions.

**Individual Suppliers are responsible for all matters concerning services, responsibilities and liabilities.**

**The Process:** An initial consultation begins the process. For all clients, the consultation consists of completing the Portfolio Information Form to establish your criteria. This can be printed off the website and filled in or over the phone with Rachel Edmeads. The Portfolio Information Form is then returned to Rachel Edmeads, along with a copy of these Terms and Conditions signed by the client and payment of the initial planning deposit of £20. This can be done by post or email in accordance with the client's wishes.

Thereafter, clients will be contacted at regular intervals with updates of the research process, and a time frame agreed for completion of the Portfolio. On the production of the Bespoke Portfolio 5% of the Total Holiday Budget (not including out of pocket expenses for meals, souvenirs etc) is due. Invoices can be by email or by post in accordance with the client's wishes.

Where Rachel Edmeads is only required to research/advise on a flight or single element where 5% is less than £20 then that sum shall be payable as the initial planning deposit.

### **Our Agreement:**

When you have decided to use the services of Rachel Edmeads, please sign and return a copy of these Terms and Conditions to represent your acceptance of them.

### **Payment:**

Payments can be made by cheque or bank transfers. All cheques are to be made payable to Rachel Edmeads. Invoices are to be settled within 7 days of the date issued.

### **Individual Supplier Payments:**

Clients are to make payments in accordance with the payment instructions of the various components of the itinerary. Rachel Edmeads shall advise the clients of all payments to be made. Should clients wish, Rachel Edmeads can make payments on the client's behalf as the client's agent. However, Rachel Edmeads will not hold funds on the clients' behalf. Prior to making payments on any client's behalf and as the client's agent, the client will be required to sign a letter of authorisation enabling payment to be made as their agent and on their behalf. A copy of the client's credit card with signature will also be required. Travel and other suppliers may likewise require authorisation from clients to enable Rachel Edmeads to make any payments as the client's agent, using the client's credit card.

Rachel Edmeads shall not be held liable for failure of clients to comply with the travel and other suppliers' payment terms.

### **Individual Suppliers Terms and Conditions:**

Clients are expected to make themselves aware of all of the travel and other suppliers' terms and conditions as they will be bound by them.

**Cancellation:**

Clients are bound by the cancellation terms of the travel and other suppliers. For any components of the itinerary booked by Rachel Edmeads, as the client's agent and on the client's behalf, the client is responsible for confirmation of the cancellation with the travel and other suppliers concerned. The client will be subject to the cancellation charges of the travel and other suppliers. Irrespective of cancellation reasons, Rachel Edmeads' fees are non-refundable.

To protect against the eventuality of cancellation, clients are advised to purchase all appropriate travel insurance at the time of making any bookings with any travel or other suppliers. It is the responsibility of clients to inform insurance companies of any medical conditions or scenarios that may affect the terms of their insurance cover.

**Amendments:**

Rachel Edmeads is happy to contact individual suppliers on clients' behalf and as their agents to try to amend their arrangements at any stage. Clients may be subject to amendment charges imposed by the travel or other suppliers involved in the itinerary.

**Special Requests:**

If you have any special requests, you should inform me of such requests prior to departure. On your behalf and as your agent, I will advise the relevant supplier of your requirements but cannot guarantee that such requests will be met. Furthermore, I have no liability to you if such requests are not met.

**Information:**

The client is responsible for providing correct information. Rachel Edmeads cannot be held responsible for clients providing incorrect information relating to names, address details, nationality, credit card details, age or any details relevant to their booking.

**Identification:**

Clients are required to have the appropriate identification, passport and visas to meet a carrier's requirements and those of any country you travel to or through. The onus to have the correct documentation is the responsibility of clients.

**Price Guarantee:**

Availability or price is not guaranteed before clients decide to book. Even then, your contractual relationship with the individual supplier may allow the supplier to alter whatever terms your contract with them allows them to alter. If clients have decided to amend an existing itinerary or their plans have changed, the cost of the itinerary could vary significantly to the original price. Clients should understand that prices can be dependent on season, availability of certain ticket types, rates of exchange, limited special offers and how far in advance an itinerary is planned.

Occasionally, airlines, hotels and other operators may impose additional charges as a result of a variety of circumstances, non-exhaustive examples of which include: changes to the price of fuel, airline insurance surcharges and rates of exchange. The individual suppliers should inform clients of any such changes. In the event that they inform Rachel Edmeads, I shall inform clients of any changes that I have been made aware of. Rachel Edmeads shall not however be liable for price changes imposed by any elements of an itinerary.

**The Client's Relationship with Rachel Edmeads:**

Rachel Edmeads is not a tour operator or travel agency. I am a specialist travel advisor and coordinator. All my itineraries are customised and tailored to the criteria of specific clients. The itineraries I propose are not 'off the shelf' and are not always suitable for the general market. Because I act as a travel scout and adviser to my clients, their itineraries are independently arranged by my clients with individual suppliers or by me as the clients' agent and on their behalf. As such, the contractual relationship between you, my client, and Rachel Edmeads is solely for you paying me for the time I spend attending you, advising you and researching for you as well as any time spent acting as your agent and on your behalf. Your purchase of any transport, accommodation and/or other tourist services is with the travel and/or other supplier and not with Rachel Edmeads.

Rachel Edmeads is not an organiser nor a retailer bound by the Package Travel, Package Holidays and Package Tours Regulations 1992 and neither is Rachel Edmeads selling or offering for sale any packages within the said Regulations. All bookings made by clients, or on clients' behalf, create contractual relations between clients and the individual suppliers. The contractual relationship is not with Rachel Edmeads.

**Complaints:**

If any aspect of your travel or holiday plans does not comply with your expectations then that is an issue between you and the relevant supplier. Any shortfall by one supplier may have an effect on other travel, accommodation or other holiday arrangements you have made. In such an eventuality there is no liability attached to Rachel Edmeads, although if contacted by you I will endeavour to help and support you as much as possible.

Some itineraries may take you to remote and exciting places where the risk of delay, injury, loss of property and discomfort may be higher. Rachel Edmeads undertakes to make all arrangements on your behalf and as your agent, on the understanding that clients appreciate and accept these elements of travel and that clients take out all appropriate insurances and make all appropriate arrangements, including medical arrangements.

**Jurisdiction:**

English law governs this agreement and any issue concerning all legal relationships between clients and Rachel Edmeads.

I, .....  
(Name of Client)

agree to the Terms and Conditions mentioned above, as indicated by my signature below:

.....

Date .....