

FROM DREAMING TO GOING

Steps To OVERSEAS TRAVEL

a guide and workbook for creating
the trip of a lifetime



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INTRODUCTION



You chose *Steps to Overseas Travel* because you want to –

- Put together an authentic, meaningful trip overseas but don't know the steps to follow or have time to figure it out.
- Stay out of debt on your trip but don't know how much to save or if it's even possible (**hint: it is!**).
- Have one place to estimate your trip costs that also automatically calculates your budget, alerts you when you've gone over budget, and provides you with options to get back on track.
- Easily know the earliest date you can travel and book your flights based on your trip plan and the money you need to save first.
- Get guidance on using credit card points for flights versus cash.
- Know how to choose the best hotels or home rentals.
- Get some practical advice from experienced travelers on how to travel overseas and keep costs down.

This guide and workbook will take you step-by-step from the very beginning stage of **dreaming** of an amazing trip, to **planning** and **saving** for everything from flights and housing to trip supplies, and to **doing** all the booking and buying tickets, which all culminates in **going!**

All you have to do is follow the **three steps** in this guide: 1) **Know the Basics**, 2) **Afford and Save**, and 3) **Book Your Trip**. As you read through this guide, you will use the accompanying *Steps to Overseas Travel Workbook* in Google Sheets to write down your responses. The workbook automatically calculates your costs and helps keep your budget on track.

Your journey through this guide and workbook will pay off with a trip of your dreams. Since you took the time to plan and save, you'll be able to enjoy your trip with peace of mind and give yourself and your family or friends an experience they will never forget.

INSTRUCTIONS



There are two parts to your purchase:

- The Steps to Overseas Travel Guide (this document) and
- The Steps to Overseas Travel Workbook in Google Sheets.

Guide Instructions:

- To navigate the guide, simply follow each step.
- When you see the Workbook graphic --> **WORKBOOK** , you know that you will be using the workbook to complete the step.

Workbook instructions:

- To access the Overseas Travel Workbook in Google Sheets, you will need a google account. Don't have one? Go to google.com --> Sign In --> Create Account.
- Once you're signed in, click this link and make a copy of the file:

[Click here](#)

- Begin using following the steps in the guide.

Continued on next page...

INSTRUCTIONS



Workbook instructions:

- White cells: The white cells are pre-filled to provide an example. Delete and complete the white cells in each tab following the steps in the guide. If you follow along with the steps in the guide, you will ensure you proceed in the correct order.
- Grey cells: Grey cells populate automatically based on the formulas I created specifically for this workbook. Do not change these. Filling information in grey cells may delete a workbook formula that could cause an error.
- Red cells: These cells are red to catch your attention for one of the following reasons:
 - You have gone over budget and need to take action to lower costs, or
 - You need to update the cell every month to keep the budget accurate. The two red cells that you have to update each month are both in Step Two: Afford and Save:
 - Row 10: How many points do I have now?
 - Row 130: How much do I have saved now?

Questions:

Contact me through the [Guide2Go Etsy shop](#). I'd be more than happy to help and want you to have a great experience.



STEP ONE

STEP ONE

KNOW THE BASICS

The Dreaming Stage

In the first step, you will start thinking and dreaming about your trip.

- Who is going with you?
- What time of year do you prefer?
- About how long can you go for?
- And the most fun of all... where do you want to go?

This is the most basic information you need to figure out before you can continue with planning the trip.

Read through this step below. Once you get to the end of the step, you will need to write down your decisions in the workbook.



STEP ONE

STEP ONE

KNOW THE BASICS



1. Who is going?

Who	Things to Consider
Just me	If you have kids, consider bringing them to give them a fun and educational experience that builds confidence and curiosity.
Me plus my family or friends	You'll need to work together to decide on the details of your trip. If you're traveling with friends, it's okay to split up for some parts of the trip since it can be hard for everyone to agree on a single itinerary.



STEP ONE

STEP ONE

KNOW THE BASICS



2. What time of year are you going?

When	Things to Consider
Summer	<p>May be the most convenient if you have kids in school.</p> <p>Can be the busiest time to travel and you may encounter more crowds.</p> <p>Can be the hottest time to travel depending on where you go.</p>
Winter Break	<p>You may experience cold temperatures and you will have to account for this in your budget if you need to buy winter clothing.</p> <p>Is less busy than summer and you will encounter fewer crowds.</p> <p>You may be able to see Christmas festivals.</p> <p>You may have to be away from family over the holidays.</p> <p>You may have less daylight hours depending on where you go.</p>



STEP ONE

STEP ONE

KNOW THE BASICS



2. What time of year are you going?

When	Things to Consider
Thanksgiving	<p>You will experience fewer crowds than summer.</p> <p>You will only have a week to travel plus weekends if you have kids in school.</p>
Spring Break	<p>You will only have a week to travel plus weekends if you have kids in school.</p>
During School	<p>Will be the least busy time to travel with the fewest crowds.</p> <p>May not be possible if you have kids. However, if you have kids in elementary school, you may be able to get permission to take them out of school for a few days to capitalize on a school holiday for a trip. I did this for a trip to London, Paris, and Jordan. An international trip is a real-life classroom.</p>



STEP ONE

STEP ONE

KNOW THE BASICS



3. How long are you going?

How Long	Things to Consider
1.5 weeks	<p>This is the minimum amount of time to travel overseas to make the cost and length of the flight worth it.</p> <p>If it's an international trip to Canada, Mexico, or somewhere else closer, a week or less is okay.</p>
3 weeks	<p>This may be the maximum amount of time vacationing overseas that you can afford if you need to get back to work or stay on a budget.</p> <p>I recommend staying abroad as long as you can since the hardest part of traveling can be affording the flights and spending the time getting there.</p>



STEP ONE

STEP ONE

KNOW THE BASICS



4. Where are you going?

1. Do an Internet search for destinations you are interested in. Read the country and city summaries on Lonely Planet or the Rick Steves guides. Explore the fun Google Travel website.
2. Consult with your travel companions on possible destinations.
3. Decide on the destinations.

You should include more than one city on your trip. A good plan for your first time overseas is London and Paris. If you have more time and money, consider adding Rome or Amsterdam.

It's hard to limit your trip since there are so many options, but remember that you can return in the future.

4. Decide on how many nights you will spend in each city.

Spend no less than three nights per city if you have never been there.



STEP ONE

STEP ONE

KNOW THE BASICS



WORKBOOK

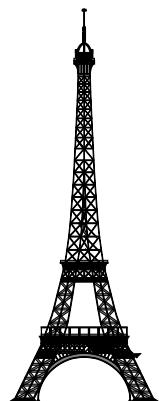
Complete Step One in the workbook

1. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step One: Know the Basics.
2. Fill in all the white cells in #s 1-4 following Step One in this guide. The cells are pre-filled as an example.

The workbook will use this information in the other tabs, saving you time.

You can change your mind later, but if you do, be sure to update the cells in this tab of the workbook.

You're ready for Step Two!





STEP TWO

STEP TWO

AFFORD AND SAVE

The Planning Stage

Now that you know where you are going and the other basics, you can plan the details and costs for --

- Flights
- Housing
- Food
- Transportation
- Fun
- Trip Preparation Purchases
- Catch-all Expenses

The purpose of Step Two is to end up with a close estimate of your total travel costs. The estimate does not need to be exact because the point is to provide you with a savings goal and a spending limit so that you can afford the trip and avoid going into debt. This step will help you save all the money for your trip in advance so that when the final credit card charges for the trip are due, you pay them in full immediately. Finally, at the end of this step, the workbook will provide you with the earliest date you can travel and the earliest date you can book your flights, based on how much you can save.



STEP TWO

STEP TWO

AFFORD AND SAVE



1. Flight Costs

You have two options to pay for flights -- use credit card points or pay with cash. Follow the steps below to explore both options, choose the best option, and estimate your cost.

Steps

Credit card points option

1. Do an Internet search for the “best credit card bonuses for travel” and find a card with a high bonus and low annual fee. Using this option requires you to open the credit card and move all of your expenses to the card so that you can earn the bonus and as many points as quickly as possible. You must set the card to autopay the entire balance every month. **This is a requirement to avoid going into debt.**

If it’s hard for you to control spending or stay out of debt, use the cash only option.

If you know you don’t want to use the credit card option, skip to #6.

2. If you want to try the points option, open the credit card and as quickly as you can, move as many expenses as possible to the credit card. Ensure you meet the requirements to receive the bonus.

Set the card on autopay to pay the full statement balance each month. Do not go into debt using this method. Adhere to a budget.

3. You must estimate the number of points you will need for the flights. Go to the credit card’s travel portal and search for flights to and from your destination.

You can go deep into the world of travel points. To learn more, try thepointsguy.com



STEP TWO

STEP TWO

AFFORD AND SAVE



1. Flight Costs

Steps

4. Determine how many points you can realistically earn each month. Look up how many points your credit card pays per dollar you spend. Some cards pay more for different categories of spending, like travel. Do some simple math by multiplying your average spending on the card per month by the points offered, for example: \$3,000 x 1 point = 3,000 points.

Other considerations for points:

Monitor travel websites like thepointsguy.com for flight deals. You can find limited-time discounts on points or cash needed. I saw a Delta deal that offered a round-trip flight from multiple US cities to London for $\frac{1}{4}$ of the points normally required. I paid only \$600 in fees and taxes for three people to travel to London and back.

You may be able to combine points and cash depending on the airline or points carrier.

WORKBOOK

5. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Two: Afford and Save. Under #1 Flight costs, complete the three white cells in Strategy 1. Also complete the red cell. If you choose to pay with points, you must update row 10 every month to keep your tracker updated. Set a reminder on your calendar. If you know you are using the cash only option, skip this step.



STEP TWO

STEP TWO

AFFORD AND SAVE



1. Flight Costs

Steps

Cash only option

6. Research potential flights and the cost (cash only, no points) using Google Flights, Expedia, or a similar website. Include the fees such as bags, seat reservations, and any other options you want in your estimated cost.

WORKBOOK

7. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Two: Afford and Save. Under #1 Flight costs, complete the three white cells in Strategy 2.

In row 16, enter the estimate for how much it will cost in cash to pay for your preferred flight overseas and your return flight. In row 17, enter how much you have saved now, if any, and in row 19, your estimate of how much you can save every month on average for just the flights.

WORKBOOK

8. Decide if you are choosing points or cash only to pay for your flights based on what you can afford and achieve. You can change your decision later on if needed.

In the *Steps to Overseas Travel Workbook* in Google Sheets, in row 23, select the option from the drop down: Cash only or Points. If you're using points, include an estimate in row 24 of how much cash you will need for bags, taxes, and fees.

The sheet automatically totals your flight cost (row 25). **Do not book any flights yet.**



STEP TWO

STEP TWO

AFFORD AND SAVE



2. Housing costs

Unless you have friendly relatives abroad, housing can be expensive. Costs vary depending on the city, but generally Airbnb or other home exchange platforms are cheaper than hotels. Use your research skills as you follow the steps below.

Steps

1. Browse a hotel website like Expedia to get an idea of what hotels and prices are available in your destinations. When you research, use travel dates 6 months in the future. Prioritize hotels that are closer to the city center to save in travel time, have higher guest ratings to ensure quality, and are close to the subway stations to minimize walking time and save your energy. Save your favorites.
2. Also browse Airbnb or other home sharing platforms. Save your favorites.

Considerations: When you're choosing housing, consider the following:

- **Location.** To save money, you can stay outside the city center in a neighborhood. This can be a rewarding experience, but make sure you are within walking distance to a subway station. Your commute to the main sites shouldn't take more than 20 minutes.
- **Quality.** Check the ratings and reviews. I don't consider any Airbnb rentals below 4.5 stars or Expedia guest ratings lower than "Wonderful". Don't take a chance on international Airbnb rentals with zero reviews.
- **Couch surfing.** Save money by having your kid(s) or friend sleep on the living room fold out couch instead of paying for an additional bedroom.
- **Laundry.** Choose housing with a washer and dryer. It's very convenient to be able to do this at your home and not have to visit a laundromat.



STEP TWO

STEP TWO

AFFORD AND SAVE



2. Housing costs

Steps

More considerations: Should you choose a hotel or Airbnb? I prefer Airbnb over hotels for many reasons:

- **Cost savings.** International Airbnb stays can be cheaper than hotels.
- **More space.** You can find places with multiple bedrooms.
- **Laundry.** You are able to find places with a washer and dryer and multiple bedrooms. Keep in mind that sometimes European dryers only rinse out the water so you can hang it to dry. You may still have to visit a laundromat.
- **Local flavor.** You will love staying outside the crowded touristy areas and in a neighborhood nearby where local families live.
- **Host bonus.** Your host can be an incredible resource for your stay and give you great recommendations. Our host in Paris walked us around the neighborhood, took us to a restaurant, and ordered for us!
- **Privacy.** You can have privacy in your own bedroom, which is great if you have kids.
- **Cooking.** Save money by buying from a store or market and cooking at home.

One downside is that apartment bathrooms in Europe can be very small.

Read the reviews. Choosing only Airbnb rentals with high ratings is key.

3. Repeat your search for each location of your trip and save your favorites.



STEP TWO

STEP TWO

AFFORD AND SAVE



2. Housing costs

Steps

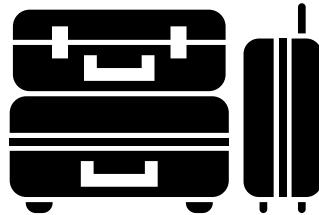
WORKBOOK

4. From your favorites, find out the cost of housing for the total number of nights you want to stay in each city.

Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Two: Afford and Save. Under #2 Housing costs, complete the white cells in column C.

The sheet includes your total estimated housing cost in row 34. **Do not book your housing yet.**

Considerations: Think about what you will do with your luggage between the time you arrive in your city and your housing check-in time. Message your Airbnb or hotel and ask if you can store your luggage there. Or, book your train or flight to arrive closer to your check-in time. There's also luggage storage sites throughout cities. Try UseBounce.com. We used this service to store our bags for the day at a souvenir shop in London and found it very convenient and reliable.





STEP TWO

STEP TWO

AFFORD AND SAVE



3. Food costs

There are two routes you can take to estimate your food costs -- eating mostly budget meals or eating moderately priced meals.

Steps

1. If you want to save money by cooking some meals at home or eating all cheap takeout, choose the budget meal option. If you don't want to cook from home and prefer to eat mostly at restaurants, choose the moderate meal option.

The sheet automatically includes a cost of \$50 a person per day for the budget meal option and \$80 a person per day for the moderate option.

Consider the following:

- The budget meal option means eating fast food, sandwiches, or other takeout, which could include yummy street food. The moderate meal option means eating some takeout but enjoying a moderately priced sit-down restaurant once a day.
- Unless you are on a very tight budget, I suggest the moderate meal option because while you are overseas you will want to enjoy restaurant food.
- You won't be able to cook from home if you're staying in a hotel, but you can still choose the budget meal option if you eat really cheaply and avoid sit-down restaurants.
- \$50 and \$80 per day are just estimates. Your actual cost will vary by day and will depend on what your food options are. If you're traveling by train all day, you may eat fewer big meals but snack more, for example.
- If you want to enjoy a special meal, add it to your Fun budget. For New Year's Eve in Switzerland, we spent \$500 for 4-course meal for three! The bill was a surprise but made for a good memory.



STEP TWO

STEP TWO

AFFORD AND SAVE



3. Food costs

Steps

WORKBOOK

2. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Two: Afford and Save. Under #3 Food costs, complete the white cells in column E.

Enter the number of days you plan to eat budget meals in row 37 and the number of days you plan to eat moderate meals in row 38. Make sure these numbers add up to the number in row 36 so that you have a plan for every day.

The sheet automatically calculates the total in row 39.

WORKBOOK

3. If one of your destinations is considered especially expensive, you will need to account for that in your budget. Expensive countries include: Switzerland, Iceland, Denmark, Norway, and Sweden. This list is not definitive, so make changes as needed. However, I can confirm from experience that Switzerland is very expensive.

In row 40, enter how many days you will be staying in an expensive country. The sheet automatically adds \$100 per day per person to your total estimated food cost.

The sheet automatically calculates your total estimated food cost (row 41).



STEP TWO

STEP TWO

AFFORD AND SAVE



4. Transportation costs

Transportation includes your flight there and back and getting from the airport to your housing, around the city, and from city to city.

Steps

1. Think about how you will get around once you are overseas. The train system in Europe is the easiest way to get from city to city. This guide assumes you will use trains as your primary mode of transportation between cities.

Buses are cheaper but slower and may not be the best option. Overnight train trips are an option for long trips over 5 hours long, but I find it difficult to sleep in the small shared compartments. Consider taking a flight when the train travel time between cities exceeds 5 hours. A cheap reliable flight carrier is Ryanair.

WORKBOOK

Transportation you will book in advance

2. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Two: Afford and Save. #4 Transportation costs includes transportation that you will buy before your trip and during your trip.

Under *Transportation you will book in advance, Trains from city to city*, complete the white cells in rows 43-49 by including all your planned train trips. Include the departing and arriving city and the total cost. You will know the cost by researching trips and prices using Omio.com. Omio is a reliable app for researching and booking European travel.



STEP TWO

STEP TWO

AFFORD AND SAVE



4. Transportation costs

Steps

WORKBOOK

3. In rows 50-55, include all other planned transportation that you can book in advance. Examples include boat or ferry tours and day train trips where you will travel somewhere nearby and return (i.e. from Rome to Pompeii and back). You can include additional flights here, too. Include the total cost for all passengers in column E.

The workbook automatically includes the total cost of all planned transportation that you will be booking in advance. **Do not book any transportation yet.**



STEP TWO

STEP TWO

AFFORD AND SAVE



4. Transportation costs

Steps

WORKBOOK

Transportation you will buy during the trip

4. There is no workbook action for you to take for estimating the cost of transportation that you will buy during the trip (i.e. bus tickets), as opposed to transportation you buy in advance (i.e. cross country train tickets):

- **To and from the airport.** For the cost of getting you from the airport to your housing when you first arrive, the sheet automatically includes a one-time \$200 for an Uber or taxi ride for all passengers. You will appreciate a car ride over public transportation that often has stairs and is difficult to use with luggage.
- **Getting around the city - public transportation.** For the cost of public transportation to get around the city, which includes bus and subway rides, the sheet automatically includes \$30 per person per day.
- **Getting around the city - rideshare.** Since Uber and taxi rides are more expensive than buses and subways, the sheet automatically includes \$75 per day for all passengers. You will want to limit rideshare because of the cost. However, you will want to plan for one rideshare per day to take a break from walking. (You can easily walk 10 miles a day in Paris.)

These amounts are estimates for the purpose of providing you with an overall estimate of trip costs. They are slightly higher to account for the currency value differences.

The sheet automatically calculates your total cost of transportation you will buy during the trip (row 61) and your total transportation cost that includes transportation you will buy in advance and during the trip (row 62).



STEP TWO

STEP TWO

AFFORD AND SAVE



5. Fun Costs

You need to plan most of your activities in advance because they can sell out. Planning ahead also keeps your budget on track.

Steps

Planned fun

1. Consider the major activities you and your companions want to do on the trip. For each city that you are visiting, do some research on Trip Advisor, Lonely Planet, and other websites or guides to find out what the most recommended attractions and activities are. You can also do an Internet search to find recommended itineraries for the number of days you are planning to be in the city.

Also consider your desire for bigger purchases. If you're a clothes lover and visiting Paris, for example, you may want to set aside a small budget for shopping.

WORKBOOK

2. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Two: Afford and Save. Under #5 Fun costs in rows 64-112, add the major activities you plan to do in each city. The cities you are visiting are automatically included in this section.

You won't be able to visit all the sites, but this is a great excuse to return in the future.



STEP TWO

STEP TWO

AFFORD AND SAVE



5. Fun Costs

Steps

WORKBOOK

3. In column E, include the cost of the activity for your whole party. Refer to the official activity website (i.e. www.toureiffel.paris) to get the most accurate price.

Considerations:

- You will want to include activities that are free since many of these still require an advanced reservation or reserved timeslot.
- See if a CityPASS is available to give you discounts for seeing multiple sites in your city.
- The costs will be listed in another currency, but try to estimate the dollar amount for the workbook.

The sheet automatically calculates your total estimated cost for planned fun that you will book in advance (row 113). **Do not make any reservations yet.**

WORKBOOK

Unplanned fun

4. There is no workbook action for you to take. The sheet automatically adds an extra cost of \$30 per person per day in row 114 for unplanned fun. This accounts for activities you won't buy tickets in advance for, such as a pop-up carnival, a museum you didn't know about in advance, and souvenirs. Try to limit your purchase of souvenirs to save money and space.

Your total estimated fun cost including planned and unplanned fun is in row 114.



STEP TWO

STEP TWO

AFFORD AND SAVE



6. Trip Preparation costs

You may need to buy a few things for your trip.

Steps

1. You probably don't have everything you need for your trip on hand. Consider what you will need to buy:

- **Passports.** Every traveler of all ages must have a passport. To be safe, passports must not expire 6 months from the last date of your trip. Review the U.S. State Department website for these requirements and costs.
- **TSA PreCheck.** If you want to skip the long lines of security within the U.S., you can apply for TSA PreCheck. The cost is \$78 per adult for 5 years. You have to do an interview, so schedule this pretty far in advance.
- **Global Entry.** You can apply for this service to expedite your return to the U.S. It's only worth doing if you take frequent international trips.
- **Luggage.** Try to pack as light as possible, but having luggage is necessary.
- **Clothes.** You may need winter weather clothes if you're going to a cold climate. My family is from a hot climate and traveled to Switzerland in winter, so we bought heavy coats, gloves, hats, and hand warmers.

If you forget something, you can buy it on your trip. Planning in advance, however, can help you manage expenses and save money.

Try to minimize these purchases to save money. Buy used or borrow from friends or family. A good source for used clothing is Poshmark or Patagonia Worn Wear.



STEP TWO

STEP TWO

AFFORD AND SAVE



6. Trip Preparation costs

Steps

WORKBOOK

2. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Two: Afford and Save. Under #6 Trip preparation costs, add what you will be buying for your trip. Include an estimate of the total cost of these purchases in column E.

The sheet automatically includes your total trip preparation costs in row 125.



STEP TWO

STEP TWO

AFFORD AND SAVE



7. Catch-all costs

Your savings goal needs to include an estimate for unexpected expenses.

Steps

WORKBOOK

Your trip will have unforeseen costs. My family caught coughs at the beginning of a European trip and had to spend \$200 on cough medicine. We also had to buy a cell phone after one stopped turning on. The workbook includes a moderate estimate of \$250 per person to help address inevitable needs that come up. Including this helps you ensure you're saving enough money to cover the trip.

No action in the workbook is needed. This amount is automatically included in #7 Catch-all costs in the *Steps to Overseas Travel Workbook* in tab Step Two: Afford and Save.



STEP TWO

STEP TWO

AFFORD AND SAVE



WORKBOOK

Your estimated trip cost, earliest travel date, and earliest flight booking date

1. Your **Total Estimated Trip Cost** is automatically included in row 128 of the *Steps to Overseas Travel Workbook* in tab Step Two: Afford and Save. This includes your total estimated costs for the flights, housing, food, transportation, fun, trip preparation, and catch-all expenses.

2. In row 129, include the amount you think you can realistically save each month starting now through your earliest travel date in row 133.

In row 130, include the amount of money you have saved right now, if any, for the trip. You must update this amount every month for your tracker to remain accurate. Set a reminder on your calendar.

3. The sheet automatically includes how much money you have left to save (row 131) based on how much you have saved now and how many more months you have left to save (row 132).

This results in your **Earliest Travel Date** in row 133. This is the earliest you can take your trip to ensure you can save the full amount by the trip start date. It's important to only travel on this date or any date after to maintain financial responsibility and keep yourself out of debt.



STEP TWO

STEP TWO

AFFORD AND SAVE



WORKBOOK

Your estimated trip cost, earliest travel date, and earliest flight booking date

4. Rows 134-137 are automatically included.

If you chose to use cash for your flights in #1 Flight costs, rows 134 and 135 show how much cash you need to save for flights and how many months are left to save the total amount.

If you chose to use points for your flights in #1 Flight costs, rows 136 and 137 show how many points you need to save for your flights and how many months are left to save the total amount.

5. Rows 138-140 show you the **earliest date you can book your flights**. This date is based on how much cash you still need to save, if you chose the cash option for your flights, or how many points you still need to save, if you chose the points option. **Do not begin booking your flights until this date to ensure you have enough money.**

If you want these dates to be sooner, then you will have to save more money per month or lower the estimated cost of your trip.

You're ready for Step Three!



Guide2Go



STEP THREE

STEP THREE

BOOK YOUR TRIP

The Doing Stage

Now that you know the estimated cost of your trip, when you can book your flights, and when you can go, you get to actually book your travel!

Step Three: Book Your Trip walks you through booking the trip that you researched and planned for in Step Two. In this step, you will document what you book and how much you spend. The workbook will automatically track and compare your spending with the estimated budget you created in Step Two. If you go over your estimated budget, the workbook will tell you and help you identify ways to get back on track.

You will book your flights first, then housing and transportation. Then you will book your planned activities and buy your trip preparation items.

Before buying tickets and reservations, make sure you have enough money saved for each item.



STEP THREE

STEP THREE

BOOK YOUR TRIP



1. Booking flights

You should book your flights first before anything else. This way you can lock in the dates of your trip to confidently book the rest of your trip.

Steps

1. Book your flights any time after the **earliest date you can book your flights** identified in the workbook in Step Two, row 138-141. Waiting until this date to book the flights ensures you have enough money saved. The ideal time to book is 3-5 months before your travel date but no earlier than the date identified in the workbook.

Choose travel dates that align with the time of year you want to go and that are no earlier than the **earliest travel date** in Step Two, row 133. This will ensure you have enough money saved by the time you travel.

When booking, use the flight deal you originally found and documented in #1 Flight Costs in Step Two of the workbook. This is to ensure you stay in budget. If the deal is no longer available, find other flights that are as close to your original budget as possible. It's okay if you go over budget somewhat, but you will need to make adjustments later to get back on track.

Read the fine print. Know if your flight is fully refundable or refundable with fees in case you need to cancel. Ensure the names you book match your passport names exactly. Enter your Known Traveler Number, if you have one, to get TSA PreCheck access.



STEP THREE

STEP THREE

BOOK YOUR TRIP



1. Booking flights

Steps

WORKBOOK

2. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Three: Book Your Trip. Under #1 Booking flights, complete the white cells in rows 6-12. This is to help you keep track of what you booked.

Note regarding row 11: Make sure you have a passport for everyone flying and that the expiration date is well after (3-6 months) your last day of your trip. If you need a passport or to renew, start the process right away.

Note regarding row 12: Starting in 2025, the European Union (EU) will require American travelers to register with the European Travel Information and Authorisation System (ETIAS) to gain entry to EU countries. It will cost about \$7. Authorization should be very quick, but you should complete this right after you book the flights to prevent unforeseen delays.

WORKBOOK

3. In row 13, enter the total amount you paid for the flights, including bags and seats. The workbook will automatically identify in row 14 if you are within the budget developed in Step Two. If you went over your budget for flights, the cell will appear red and show by how much you went over.

You must take steps to adjust the budget if you are over.



STEP THREE

STEP THREE

BOOK YOUR TRIP

WORKBOOK



1. Booking flights

Steps

4. If you are over budget in row 14, you must choose one option from below and follow the steps:

Note: Make a note somewhere if you reduced your budget by more than what you needed to. Then, if you go over your budget again later, you may not have to reduce anything else.

- **Reduce costs in another area.** You must decide what you can reduce or eliminate from your trip plan by the amount you went over. For example, you can remove one planned activity from Step Two. Or, you may need to remove two activities or one planned transportation depending on how much you went over. The amount you went over is in Step Three, row 14.
 - If you choose this option, follow these steps: **1)** Identify what you are reducing or eliminating from your housing, transportation, fun, or trip preparation plans by the amount you went over and make the changes in Step 2. **2)** Put the actual amount you spent on flights in Step Two (row 16 if you paid all cash or row 24 if you paid with points).

Continued on next page...



STEP THREE

STEP THREE

BOOK YOUR TRIP

WORKBOOK



1. Booking flights

Steps

- **Save more money per month.** Step Three, row 15 shows you how much more you need to save each month.
 - If you choose this option, follow these steps: **1)** In Step Two, row 129 add on how much more you need to save each month. **2)** Put the actual amount you spent on flights in Step Two (row 16 if you paid all cash or row 24 if you paid with points).
- **Plan for more budget meals.**
 - If you choose this option, follow these steps: **1)** In Step Two, increase the number of budget meals in Step Two, row 37 and reduce the number of moderate meals. **2)** Put the actual amount you spent on flights in Step Two (row 16 if you paid all cash or row 24 if you paid with points).

Check Step Three, row 14. It should no longer be red or negative.

Considerations: There's a lot of advice out there on how to handle the long flight overseas. My strategy is to keep myself busy with entertainment since sleep is hard to come by. Watch movies, read, and play games. This means you will lose a night of sleep but that can work to your advantage. You will already be tired from jet lag. With the extra exhaustion from not sleeping on the plane, you will easily fall asleep your first night abroad and feel decently rested the next day. Don't nap after you get there so you can get the full first night of sleep.





STEP THREE

STEP THREE

BOOK YOUR TRIP



2. Booking housing

Steps

1. Start booking your housing once you have enough money saved. Review your favorites that you saved and aim to stay within the budget you identified for each city in Step Two, #2 Housing costs.

If you have the option, choose refundable over non-refundable bookings in case you need to change them later.

WORKBOOK

2. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Three: Book Your Trip. Under #2 Booking housing, complete the white cells as you complete the bookings. This is to help you keep track of what you booked.

The workbook will automatically identify in row 42 if you are within the budget. If you went over your budget for housing, the cell will appear red and show by how much you went over.

You must take steps to adjust the budget if you are over.



STEP THREE

STEP THREE

BOOK YOUR TRIP

WORKBOOK



2. Booking housing

Steps

3. If you are over budget in row 42, you must choose one option from below and follow the steps:

Note: Make a note somewhere if you reduced your budget by more than what you needed to. Then, if you go over your budget again later, you may not have to reduce anything else.

- **Reduce costs in another area.** You must decide what you can reduce or eliminate from your trip plan by the amount you went over. For example, you can remove one planned activity from Step Two. Or, you may need to remove two activities or one planned transportation depending on how much you went over. The amount you went over is in Step Three, row 42.
 - If you choose this option, follow these steps: **1)** Identify what you are reducing or eliminating from your transportation, fun, or trip preparation plans by the amount you went over and make the changes in Step 2. **2)** Put the actual amount you spent on housing in Step Two, rows 28-33.

Continued on next page...



STEP THREE

STEP THREE

BOOK YOUR TRIP

WORKBOOK



2. Booking housing

Steps

- **Save more money per month.** Step Three, row 43 shows you how much more you need to save each month.
 - If you choose this option, follow these steps: **1)** In Step Two, row 129 add on how much more you need to save each month. **2)** Put the actual amount you spent on housing in Step Two, rows 28-33.
- **Plan for more budget meals.**
 - If you choose this option, follow these steps: **1)** In Step Two, increase the number of budget meals in Step Two, row 37 and reduce the number of moderate meals. **2)** Put the actual amount you spent on housing in Step Two, rows 28-33.

Check Step Three, row 42. It should no longer be red or negative.



STEP THREE

STEP THREE

BOOK YOUR TRIP



3. Food

There is no action to take for booking food, except for foodies who may want to make a reservation at an in-demand restaurant. You may also want to consider making reservations if you visit a smaller city during a busy holiday, like Zermatt, Switzerland on New Year's Day.

WORKBOOK

Document these reservations in the *Steps to Overseas Travel Workbook* in tab Step Three: Book Your Trip, under #3 Food. Write down where these reservations exist in case you need to change them later.



STEP THREE

STEP THREE

BOOK YOUR TRIP



4. Booking transportation

Steps

1. Review what you recorded in Step Two, #4 Transportation costs, rows 44-56 and start booking your transportation once you have enough money saved. Train costs can rise significantly the longer you wait to book, so don't wait too long. Aim to stay within the budget you identified in Step Two.

WORKBOOK

2. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Three: Book Your Trip. Under #4 Booking transportation, complete the white cells as you complete the bookings. Check the box when you have booked each of the train and other planned transportation reservations. This is to help you keep track of what you booked.

The workbook will automatically identify in row 61 if you are within the budget. If you went over your budget for transportation, the cell will appear red and show by how much you went over.

You must take steps to adjust the budget if you are over.



STEP THREE

STEP THREE

BOOK YOUR TRIP

WORKBOOK



4. Booking transportation

Steps

3. If you are over budget in row 61, you must choose one option from below and follow the steps:

Note: Make a note somewhere if you reduced your budget by more than what you needed to. Then, if you go over your budget again later, you may not have to reduce anything else.

- **Reduce costs in another area.** You must decide what you can reduce or eliminate from your trip plan by the amount you went over. For example, you can remove one planned activity from Step Two. The amount you went over is in Step Three, row 61.
 - If you choose this option, follow these steps: 1) Identify what you are reducing or eliminating from your fun or trip preparation plans by the amount you went over and make the changes in Step 2. 2) Put the actual amount you spent on transportation in Step Two, rows 45-55.

Continued on next page...



STEP THREE

STEP THREE

BOOK YOUR TRIP

WORKBOOK



4. Booking transportation

Steps

- **Save more money per month.** Step Three, row 62 shows you how much more you need to save each month.
 - If you choose this option, follow these steps: 1) In Step Two, row 129 add on how much more you need to save each month. 2) Put the actual amount you spent on housing in Step Two, rows 45-55.
- **Plan for more budget meals.**
 - If you choose this option, follow these steps: 1) In Step Two, increase the number of budget meals in Step Two, row 37 and reduce the number of moderate meals. 2) Put the actual amount you spent on housing in Step Two, rows 45-55.

Check Step Three, row 61. It should no longer be red or negative.



STEP THREE

STEP THREE

BOOK YOUR TRIP



5. Booking fun

Steps

1. Review what you recorded in Step Two, #5 Fun costs, rows 65-112 and start booking your fun once you have enough money saved. Aim to stay within the budget you identified in Step Two.

Don't wait until the last minute or until you get there. Surprisingly, some attractions can sell out. I waited to buy Eiffel Tower tickets going to the top and was disappointed to find out they were sold out over a month in advance of the Christmas holidays. We were still able to go to the second level though.

Save PDF copies of your tickets in one online folder so you can easily find and show them to the ticket taker. Arrange them by date to make it even easier for yourself.

WORKBOOK

2. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Three: Book Your Trip. Under #5 Booking fun, check the boxes and complete the white cells as you buy the tickets. This is to help you keep track of what you booked.

The workbook will automatically identify in row 114 if you are within the budget. If you went over your budget for fun, the cell will appear red and show by how much you went over.

You must take steps to adjust the budget if you are over.



STEP THREE

STEP THREE

BOOK YOUR TRIP

WORKBOOK



5. Booking fun

Steps

3. If you are over budget in row 114, you must choose one option from below and follow the steps:

Note: Make a note somewhere if you reduced your budget by more than what you needed to. Then, if you go over your budget again later, you may not have to reduce anything else.

- **Reduce costs in another area.** You must decide what you can reduce or eliminate from your trip plan by the amount you went over. For example, you can remove one planned activity from Step Two. The amount you went over is in Step Three, row 114.
 - If you choose this option, follow these steps: 1) Identify what you are reducing or eliminating from your fun or trip preparation plans by the amount you went over and make the changes in Step 2. 2) Put the actual amount you spent on fun in Step Two, rows 66-112.

Continued on next page...



STEP THREE

STEP THREE

BOOK YOUR TRIP

WORKBOOK



5. Booking fun

Steps

- **Save more money per month.** Step Three, row 115 shows you how much more you need to save each month.
 - If you choose this option, follow these steps: 1) In Step Two, row 129 add on how much more you need to save each month. 2) Put the actual amount you spent for each fun activity in Step Two, rows 66-112.
- **Plan for more budget meals.**
 - If you choose this option, follow these steps: 1) In Step Two, increase the number of budget meals in Step Two, row 37 and reduce the number of moderate meals. 2) Put the actual amount you spent for each fun activity in Step Two, rows 66-112.

Check Step Three, row 114. It should no longer be red or negative.



STEP THREE

STEP THREE

BOOK YOUR TRIP



6. Trip preparation purchases

Steps

1. Review what you recorded in Step Two, #6 Trip preparation costs, rows 118-124 and buy each of these items as you have enough money saved. Aim to stay within the budget you identified in Step Two. Again, consider your true need for these and purchase only what is necessary and try to buy used or borrow when possible.

WORKBOOK

2. Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to tab Step Three: Book Your Trip. Under #6 Trip Preparation Purchases, document your purchases and costs.

The workbook will automatically identify in row 128 if you are within the budget. If you went over your budget for purchases, the cell will appear red and show by how much you went over.

You must take steps to adjust the budget if you are over.



STEP THREE

STEP THREE

BOOK YOUR TRIP

WORKBOOK



6. Trip preparation purchases

Steps

3. If you are over budget in row 128, you must choose one option from below and follow the steps:

At this point, you have probably booked most or all of your transportation and activities. You have definitely booked your flights and your housing. If you need to overspend on trip preparation purchases, your best option will be one of these two:

- **Save more money per month.** Step Three, row 129 shows you how much more you need to save each month.
 - If you choose this option, follow these steps: 1) In Step Two, row 129 add on how much more you need to save each month. 2) Put the actual amount you spent for each trip preparation purchase in Step Two, rows 118-124.
- **Plan for more budget meals.**
 - If you choose this option, follow these steps: 1) In Step Two, increase the number of budget meals in Step Two, row 37 and reduce the number of moderate meals. 2) Put the actual amount you spent for each trip preparation purchase in Step Two, rows 118-124.

Check Step Three, row 128. It should no longer be red or negative.



STEP THREE

STEP THREE

BOOK YOUR TRIP

WORKBOOK



Total amount spent and total trip cost

Your Total Amount Spent: Pre-trip is automatically included in row 130 of the *Steps to Overseas Travel Workbook* in tab Step Three: Book Your Trip. This includes your total amount spent on planned expenses (i.e. flights, housing, planned transportation, planned fun, and trip preparation).

Your Total Trip Cost: Pre-trip and During Trip is automatically included in row 135 of the *Steps to Overseas Travel Workbook* in tab Step Three: Book Your Trip. This includes your total amount spent on planned expenses (i.e. flights, housing, planned transportation, planned fun, and trip preparation) plus your estimated costs *during* the trip for food, transportation, fun, and catch-all for unforeseen expenses.

You're ready for your trip!

Congratulations! You completed all the steps and are ready for an amazing trip overseas. Great job taking the time to plan and save!

See the next page for your Final Trip Summary.



FINAL TRIP SUMMARY

The Going Stage



WORKBOOK

Trip summary and budget

Open the *Steps to Overseas Travel Workbook* in Google Sheets and go to the last tab: Final Trip Summary. The workbook automatically pulls information from the other tabs here to show you the most important information about your trip.

This tab is for your reference. No action is needed except to make note of your budget for spending during your trip (rows 17-21). You will want to stay as close to these costs during your trip as possible to stay on budget.

As you count down the days until your trip, take some time to read about your destinations. Consider looking over the maps to see what is on the streets you are staying. Walk down your street with Google Street View or use a virtual reality headset. The more you learn about where you are visiting, the more the excitement will build, and you will appreciate your trip even more.

Bon voyage!

THANK YOU

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