



Legacy Wise Events, Travel & Concierge

Wedding Planning Before the First Vendor Quote

Couples, families and coordinators planning a wedding or celebration.

This workbook is a coordination tool. It does not supply vendor contracts, legal advice or a substitute for venue and provider requirements.

Four checks before you proceed

Build the decision brief together

Agree on the guest range, date choices, venue type, overall spending limit and three priorities before requesting quotes. Record who can approve each category and who will attend vendor discussions. Separate booked vendors from vendors still needed. Include guest travel and honeymoon coordination in the brief when relevant, so they are not discovered after the event budget is committed.

Compare full vendor responsibilities

Ask each vendor to state exactly what is included, excluded and dependent on someone else. Record staffing, setup, breakdown, delivery, overtime, revisions and the approval timeline. Keep deposits and remaining balances on a separate schedule. Review written cancellation and change terms with the appropriate adviser when needed. Do not assume a coordinator and a full-service planner provide the same scope.

Coordinate guests and movement

Keep a master guest reference list without placing sensitive information in a general worksheet. Track RSVP status, travel questions and follow-up ownership. Verify pickup windows, lodging contacts and accessibility arrangements with the responsible provider. Circulate one approved guest information sheet. Changes to the schedule should identify who notifies guests, vendors and the venue.

Make the day-of handoff usable

Work backward from key event moments. Identify setup access, vendor arrival, ceremony cues, reception transitions, deliveries and breakdown. Add an owner and backup to each critical task. Give vendors the final version and a contact hierarchy. Record changes after approval. Finish with balances, returned items, unresolved concerns and where the couple can find their final records.

Your next step

Open question	Who should answer	Next date

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