

# Your Retreat Planner Checklist

The perfect timeline to follow to create, lead, fill and lead your dream retreat.





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The perfect timeline to follow to create, lead, fill and lead your dream retreat.

Your Retreat Planner Checklist will give you a clear timeline to follow to no how to plan, promote and prepare to lead your dream retreat.

Follow it carefully and you are guaranteed to lead a successful and profitable retreat that will make a deep impact on all of your participants.

## 12 months - The Idea Stage

This is the time to envision your retreat and brainstorm ideas about how you want your retreat to be.

- Create the vision for your retreat.

Sit down and visualize how your retreat will feel, the location, venue, activities and who your ideal participants will be. This is crucial to set the tone for every step to follow. Keep coming back to your vision if you get stuck at any step along the way to leading your retreat. Write out your vision:

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- Set the goals for your retreat.

What are the goals you have for this retreat? Is your goal to make a profound impact for your participants? To share a powerful experience with your clients? To deepen your connection with your participants? To make a nice sum of money? All of the above? List your overall goals for your retreat:

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## 12 months - The Idea Stage continued

- Set the goals for your retreat con't.

### a. Goal for your participants.

What do you want your retreat participants to get out of coming on your retreat? What will they learn? What will be their take away after the retreat? What are the realizations you would like to see them have?

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### b. Goal for your business.

How do you want your retreat to impact your business? Do you want to attract new clients through your retreat? Or deepen relationships with existing clients? Do you want to branch out and expand your services by offering retreats? Do you want to add another source of income for your business?

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### c. Goal for you, professionally and personally.

What are your professional goals for this retreat? To step up your leadership skills? To uplevel yourself as a successful entrepreneur? To take your coaching skills to the next level with the level of intimacy that a retreat provides?

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- Determine the transformation you want your participants to take away from your retreat.

What is the transformation you want for your retreat participants? What is the benefit they are looking for by coming on this retreat? How can you change the life of your client by them attending this retreat?

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12 months - The Idea Stage continued

- Identify your ideal retreat participants.  
One of the most important steps to filling your dream retreat is knowing exactly who are your ideal participants. Your ideal retreat participant may not be the same as your ideal coaching client. Identify exactly who they are.

Gender\_\_\_\_\_

Profession or how they identify themselves, i.e., moms, single, entrepreneurs, etc. \_\_\_\_\_

\_\_\_\_\_

Age range \_\_\_\_\_

Income level\_\_\_\_\_

Hobbies and interests\_\_\_\_\_

Religion/Spiritual \_\_\_\_\_

Where and how they live (big city, rural, apartment, home owner, etc.)\_\_\_\_\_

\_\_\_\_\_

Create an avatar for your ideal retreat participant.

Name (create a name for him/her) \_\_\_\_\_

Write a short description or bio for your retreat participant avatar \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

9-12 months – Creating Your Retreat

- Pick the destination for your retreat.  
Now that you have your vision and goals identified, you want to pick a location that aligns with them. Pick your location based on the desires of your potential retreat clients, not your bucket list destination. List the top three locations for your retreat and their pros and cons, then circle the one that aligns the most with your retreat vision.

**Location**

1) \_\_\_\_\_

Pros	Cons
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

9-12 months – Creating Your Retreat

- Pick the destination for your retreat con't.

Location

2)

Pros	Cons

Location

3)

Pros	Cons

Now that you have listed the pros and cons of your retreat location, which is the obvious winner?  
Perfect Location\_\_\_\_\_

- Choose and confirm the venue; hotel, retreat center, house rental.  
Will you choose a hotel which could be an all inclusive resort or small boutique hotel, or an established retreat center, or possibly rent an entire house through Air BnB? Think about the feel of each venue option and keeping your retreat goal and vision in mind, which type of venue is best for your retreat? Write which you have chosen and why.

9-12 months – Creating Your Retreat

- Decide on any tours and activities for the retreat.

What tours and activities (like cooking or art classes) are available in the area of your retreat? List them all below. Which ones align with the vision and goal of your retreat? Pick ones that your participants will enjoy and will support the theme of your retreat.

Tours

Activities

- Team and support staff.

Will you bring an assistant, event planner or other team members to support you in leading your retreat? How about before the retreat, will you have a VA or someone to help you with emails, organizing, website design or enrollment? You may do it all yourself if you prefer too.

List any team members you will use for your retreat:

- Equipment and supplies

What equipment and supplies will you need to purchase or rent for your retreat? Such as whiteboard, easel, sound system, arts and crafts supplies, journals, crayons, etc.

- Insurance and legal.

Will you have your participants sign a liability waiver or a contract? Will you ask your lawyer to look at the hotel or venue contract? Will you get travel insurance for yourself or the whole group? Which of these will you need for your retreat?

9-12 months – Creating Your Retreat

- Create a budget and set the price.  
Now that you have finalized all of the expenses of your retreat, create your budget in a spreadsheet and then set your price adding at least a 15-25% profit margin.

What is the cost per person for your retreat? \_\_\_\_\_  
What will be the price per person for your retreat?\_\_\_\_\_

- Set the itinerary.  
Create a day to day schedule for your retreat.  
Here is an example for one day of a retreat itinerary:

Day 1  
7:00 am yoga  
8:30 am breakfast  
9:30 am content discussion  
12:30 pm lunch  
1:30 pm tour to local cultural spot  
6:30 pm dinner at local restaurant  
8:00 pm sharing circle and guided meditation

Create the itinerary for your retreat (Even if you don't know the exact times and activities, play around with creating your itinerary and I guarantee it will give you great clarity for your retreat.)

Day 1

Day 2

9-12 months – Creating Your Retreat

Day 3

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Day 4

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Day 5

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- Build a webpage with payment options.

Every retreat will need a website presence that you can refer your potential participants to so they can see all the details, itinerary, dates and price. You can have a dedicated retreat page on your business website or you can build a stand alone website for your retreat.

Will you have a webpage on your business site or a stand alone website for your retreat?

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- Decide how you will take payments.

You can set yourself up with PayPal, get a merchant account to take credit cards, Eventbrite or even have people mail in checks. Which method will you use? \_\_\_\_\_

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9-12 months – Creating Your Retreat

- Announce your retreat to the world and open enrollment.  
Woo Hoo! You have everything in place now to announce your website to the world!

- Create a marketing plan to promote and fill your retreat.  
You are only limited by your imagination in how you will spread the word to fill your retreat. Below is a list of possible ways for you to attract your ideal retreat participants. Put a check mark beside each one you plan to use and the date you plan to use it.

	Yes/no	Date
1. Email to your existing email list		
2. Public speaking		
3. Facebook Lives		
4. Instagram		
5. YouTube		
6. Blogs (Yours &/or guest blogging)		
7. Podcast (Yours &/or guest interviews)		
8. Radio & internet radio interviews		
9. Magazine articles & interviews		
10. Meetup groups (Yours &/or other people's)		
11. Webinar		
12. JV & referral partners		
13. List on retreat websites		
14. Facebook ads		
15. Magazine ads		
16. Other paid advertising		

6-9 months – Filling Your Retreat

- Focus on promoting your retreat.  
Keep promoting your retreat if you are not sold out yet. List which methods you will keep using to spread the word about your retreat.

## 6-9 months – Filling Your Retreat

- Contract any support team for the retreat.  
Will you have an assistant on your retreat? How about a VA to help with emails and promotion?  
Now is the time to hire them and get them ready to support you.  
List the team members, if any, you will hire for your retreat.  
  

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- Contract for any meals you may provide.  
Will you provide any meals on your retreat? Will your retreat participants be able to order from a restaurant? If so, now is the time to come up with a sample menu that fits your budget with the hotel or restaurant. Maybe you are planning in hiring a local chef to cook for your retreat. It is time to plan the menu being aware you might have special dietary requirements from your participants.  
List the meals you will provide and make a check mark if you have come up with a menu.

Breakfast	Lunch	Dinner

- Contract for any transportation services you will provide.  
Will you need to arrange airport transfers to your venue? How about shuttle vans to meals and activities? Now is the time to pay any deposits to confirm all your transportation needs on your retreat.  
List the transportation needs and the name of the company, contact name and email or phone and how much you have paid them.

Company	Contact person	Email/phone	Deposit amount

6-9 months – Filling Your Retreat

- Book your travel to the location.  
How will you travel to your retreat location? Can you drive? Take a bus or train? Or do you have to book a flight? It's time to book your travel to guarantee a lower fare and make sure you can get there. Write how you will travel to your location and put your confirmation code and times here.

Method of travel	Confirmation code	Date and time

3-6 months – Finalizing Details

- Confirm venue, tours and activities, make any necessary payments.  
Now is the time to get in touch with your venue, tour operators and activity leaders to confirm your dates and number of people on your retreat and make any final payments to them.  
List your vendors and make a check after you have contacted each one.

Vendor name	Confirmed	Date

- Arrange for any equipment needed for your retreat, i.e., microphone, white board, sound system, etc.  
Make a list of all the equipment you will need for your retreat and note if you have to bring it with you or where you will get it from. Make a check mark if you have confirmed it.

Equipment	Bring or get local	Confirmed

## 3-6 months – Finalizing Details

- Collect final payments from participants.

By 3 months out from your retreat, you should collect all the payments from your participants. That way you have all the money you need to make all your final payments for all your retreat expenses so you do not have to think about the money while leading your retreat.

List the names of the participants who still owe money and the date you will contact them.

**Participant name**

**Date**


- Send out and collect info on each participant, i.e., diet, medical issues, emergency contact, etc.

You will need to know some basic information for each of your participants. Send out a form for them to fill out their information for you.

Here is an example of the questions to ask:

1. **Legal name** (as on passport) \_\_\_\_\_
2. **Passport number** (if traveling internationally) \_\_\_\_\_
3. **Emergency contact name and phone numbers** \_\_\_\_\_
4. **Medical issues** (allergies, seizures, limited mobility, etc.) \_\_\_\_\_
5. **Dietary restrictions** (vegan, dairy free, etc.) \_\_\_\_\_
6. **Physical ability** (such as swimming proficiency, hiking endurance, etc.) \_\_\_\_\_

You can also ask questions pertaining to the goal of your retreat, such as:

7. **Have you meditated before?** \_\_\_\_\_
8. **Years practicing yoga** \_\_\_\_\_
9. **Have you ever communicated with animals before?** \_\_\_\_\_
10. **Do you get seasick?** \_\_\_\_\_

And so on.

## 3-6 months – Finalizing Details

- Send out and collect liability waivers for participants.

It is a good idea to have each of your participants sign a liability waiver for the time they will be on the retreat. Consult your attorney to create a safe liability waiver for you.

**Waiver created Yes/No** \_\_\_\_\_

**Date sent to participants** \_\_\_\_\_

- Send out packing list and travel info to participants.

Make it easy for your participants, create a packing list of things to bring on the retreat. Send them out any travel info details, such as where to meet you on the first day, address of the venue, etc.

Write the dates of each.

**Packing list created** \_\_\_\_\_

**Packing list sent** \_\_\_\_\_

**Travel info written** \_\_\_\_\_

**Travel info sent** \_\_\_\_\_

- Continue promoting your retreat if you have any open spaces.

List the methods you will use to continue promoting your retreat if needed.

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- Make sure your participants have booked their travel to the location.

Check with each of your participants to make sure they have booked their travel to the location and answer any questions they may have about booking their travel.

Write the date you will contact each of your participants.

**Date contacted** \_\_\_\_\_

## 1-3 months – Preparing to Lead Your Retreat

- Finalize the itinerary and create a daily schedule for you and the participants.

Go over your itinerary and make any adjustments you may need and send to participants.

**Date itinerary is revised** \_\_\_\_\_

**Date sent to participants** \_\_\_\_\_

## 1-3 months – Preparing to Lead Your Retreat

- Send final payments to venue, tours, activities, transportation, caterers, etc.

If you have any final payments for your venue and any other expenses for your retreat, now is the time to get them all paid in full.

List any payments you still need to make to your vendors and the date you will pay them.

**Vendor**

**Amount due**

**Date paid**


- Write the content you will present at the retreat.

Now it's time to write the content you will deliver at your retreat. Start with an outline of what you want to teach, then fill it in with bullet points and then fill in the details.

**Date completed**

**Content outline** \_\_\_\_\_

**Content bullet points** \_\_\_\_\_

**Content details** \_\_\_\_\_

- Decide on and order a gift for each participant, i.e., journal, T-shirt, back pack, etc.

It is great to give a gift, even if small and inexpensive to each of your retreat participants. Now is the time to decide on your gift and order it so it will arrive in time for your retreats.

**Gift**

**Purchased/Ordered**

**Arrival date**

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- Hold a group call to prepare and answer questions from your participants, help them to create connection with each other.

Select a date, time and method, such as Zoom, teleconference, Skype, etc., for at least one call to meet and connect with your retreat participants.

**Call date**

**Time**

**Method**

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- Continue promoting retreat, if need be.

What are the final methods you will use to fill the last spots on your retreat?

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1-3 months – Preparing to Lead Your Retreat

- Create a waiting list of interested participants in case of any cancellations.  
If your retreat is sold out, create a waiting list of anyone who has expressed interest in your retreat in case there are any last minute cancellations and there are people you can contact when you announce your next retreat.

Name of person	email	phone

2-4 weeks – Finalizing the Details

- Check in with venue, tours, activities, meals, transportation, team, equipment, to make sure everything is ready and confirmed for your group’s arrival.  
At this point everything should be all set, paid for and confirmed, but it is always a good idea to do a final check in with each of your vendors to make sure they are ready and have everything they need from you.

Vendor	Date of check in

- Print any handout materials you may have.  
Get all of your handouts and materials printed and ready to pack in your suitcase.

Date
Handouts printed _____

- Purchase all supplies you will bring with you.  
List the supplies you need to purchase.

Name of supply	Date purchased

## 2-4 weeks – Finalizing the Details

- Purchase all supplies you will bring with you, continued.

List the supplies you need to purchase.

**Name of supply**

**Date purchased**


- Create a packing list for yourself.

Use the packing list you sent to your participants and add anything else you need as the retreat leader.

Here are a few suggestions:

**Clothes** \_\_\_\_\_

**Raincoat, jacket, sun hat, sun glasses** \_\_\_\_\_

**Swim suit, snorkel equipment, etc.** \_\_\_\_\_

**Shoes, flip flops, sandals** \_\_\_\_\_

**Personal toiletries** \_\_\_\_\_

**Medicines, sun screen** \_\_\_\_\_

**Favorite snack items for yourself** \_\_\_\_\_

**Camera** \_\_\_\_\_

**Gift for participants** \_\_\_\_\_

**Supplies, equipment & handouts** \_\_\_\_\_

**Passport** \_\_\_\_\_

**Music for your room &/or to share with group** \_\_\_\_\_

**Personal items to create sacred space in your room** \_\_\_\_\_

- Line up any at home care you will need for your family and/or pets, plants, etc.

Will you need a house or pet sitter while you are away? How about someone to water your plants and bring in your mail?

**Care giver**

**Date contacted**


2-4 weeks – Finalizing the Details

- Make sure your participants have everything they need and questions answered.  
Check in with all of your participants to make sure they are all set to go on your retreat and see if there are any last minute questions.

Check in date

Final check in \_\_\_\_\_

1-2 weeks – Getting ready to depart

- Tune back in to your vision and goals, refocus on why you wanted to lead the retreat.  
Take a moment to get quiet and tune back into the original vision you had for your retreat. See how it feels now that it is almost ready to happen. See if you receive any new insights for your retreat.  
Reflect on what you saw and felt when you tuned back into your retreat vision.

- Make any last minute purchases.  
What's missing from your packing list? Do you have enough shampoo or deoderant? Now is the last opportunity to pick up the final items for your retreat. You don't want to worry about finding the time to go shopping while on your retreat.

Item	Date purchased

- Start packing.  

Date packed \_\_\_\_\_
- Arrange your ride to the airport. \_\_\_\_\_

1-2 weeks – Getting ready to depart

- Arrange your ride to the airport.  
Make final arrangements to get to the airport, train station or start packing your car if you are driving to the retreat destination. Will you be using long term parking, Uber or Lyft, shuttle van or having a family member or friend take you to the airport?

Method to get to airport	Date booked
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1-5 days – You Are Almost There!

- Keep breathing and channel your excitement into productive time management this last week.  
By now you should have almost everything ready to go for your retreat. It is important to take care of yourself and stay focused on your goal of providing a deep transformational experience on your retreat.  
Reflect on your thoughts and feelings only a few days away from leading your retreat. Honor and acknowledge any fears and doubts that may come up and let them go, because YOU GOT THIS!

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- Set your voicemail and email auto-responders letting people know you will be away.  
**Set your auto-responders****Date set**

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- Notify your bank and credit cards if you are traveling internationally.  
List your bank and credit cards and the date you set your travel alerts.

Bank or CC	Date set
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Departure Day – Here You Go!

- Final check to make sure you packed everything you will need.  
Do a final check to make sure you have not forgotten anything you will need on your retreat.  
**Final check, Yes/No** \_\_\_\_\_
- Travel to the location.  
Woo Hoo! The day you have been dreaming of and planning so long for is finally here. Take a deep breath, grab your bags and tickets and away you go! Let the magic begin!  
Reflect on how it feels to be traveling to your retreat destination.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Greet your participants.  
How exciting! It is time to meet and welcome each of your retreat participants. Take a deep breath and remember that they are excited and may be nervous, unsure and maybe even a little scared as they arrive. Your job is to set the tone for the retreat.  
What qualities and ways of being will you embody as you meet your participants. Examples, confident, excited, grateful, open, calm, etc.  
List the qualities you will emulate:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Begin your retreat!  
Keep breathing. The day you have been so anxiously waiting for is here. Time to dive in and open the door to powerful transformation for your participants.  
Write yourself some reminders of your retreat goal, vision and results you want to see during the retreat.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# During the Retreat – Stay in the Moment

- Have fun and enjoy the retreat. Remember, you set the tone for everyone else.  
Remember to relax, play, laugh and enjoy the retreat alongside your participants. Don't overthink or worry about what is going to happen. Trust, breathe and enjoy.  
List some ways to remind yourself to have fun and enjoy the retreat.  
  

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- Go with the flow of the retreat, allow and embrace the unexpected.  
Stuff happens and it is often completely out of your control. Weather, transportation delays, power outages, etc. Don't resist it. Use them to think out of the box to create an even more powerful experience than you had planned for your clients. Have some extra activities in your back pocket that you can pull out if something unexpected disrupts your plans.  
Make a list of some extra activities you can offer if something changes your retreat plans.  
  

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- Allow for play and spontaneity.  
Don't be afraid to get silly, laugh out loud, sing and play on your retreat. If you let yourself play, then you are giving permission to all of your participants to play, laugh and get silly too.  
Reflect on how you feel when you allow yourself to get silly, laugh and play.  
  

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- Trust your heart. Do not listen to self-doubt or fears.  
It is perfectly normal for your doubts, worries and fears to pop up during your retreat. Acknowledge them, thank them for sharing, but do not buy into them. Do not waste any time on them at all. Keep focused on your participants and the fact that they believed in you enough to come on your retreat.



During the Retreat – Stay in the Moment

- Trust your heart. Do not listen to self-doubt or fears, continued.  
List some methods to release and move past any doubts, concerns or fears that come up.

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- Practice self-care to stay rested and energized.  
While on your retreat it is important to take care of yourself and keep your energy high and on when you need to be. Practicing self care and giving yourself time to relax and rejuvenate is critical while you are leading your retreat.

List the methods you will use to take care of yourself. Examples, get a massage, soak in a hot bath, meditate, take a nap, listen to music, talk to your family or a close friend, read, etc.

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Celebration – Celebrate Your Success!

- Do something nice for yourself to celebrate the success of your retreat. i.e., stay a few extra days on location to enjoy your retreat location on your own, or with friends or family. Have a spa day. Buy yourself something nice.  
Jot down some ideas of ways you will celebrate after your successful retreat.

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**Celebration – Celebrate Your Success!**

- Honor yourself for all of your hard work.

What are some ways that you can honor yourself for successfully leading your retreat? For example, adding 'Retreat Leader' to your bio and signature. Sharing in peer groups in person or online about your accomplishment. Posting a group photo of your retreat participants and you in your office.

List some ways you can honor yourself for completing your successful retreat.

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- Show gratitude to your team, associates and your participants.

What are some ways you can show your gratitude to those who supported you in leading your retreat? Buy your team and JV partners a little gift. Print out the group photo and send to your participants. Take your team to dinner.

List some ideas of how you can show your gratitude to all those who made your retreat possible.

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**After the Retreat – Follow Up**

- Collect video testimonials on the last day of the retreat.

One of the best ways to entice people to your next retreat is for them to see testimonials from your last retreat. The best time to get these testimonials is on the last day of the retreat when they are excited and still in the glow of the retreat energy. You can also ask for written testimonials too.

Will you ask your retreat participants for a testimonial? If so, will they be video or written?

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- Send out post retreat content, photos and videos to keep the magic of the retreat flowing.

A great way to keep the energy of the retreat flowing afterwards is to send out your best photos by a digital file or DropBox. You can make a video from the retreat on YouTube. You can hold group calls to connect or deliver follow up content.

## After the Retreat – Follow Up

- Send out post retreat content, photos and videos to keep the magic of the retreat flowing, continued.

How will you keep the energy of your retreat flowing for your participants? List some ways below.

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- Offer upsell or ongoing support to your participants.

Will you be offering another retreat, membership group, mastermind or 1-on-1 coaching or maybe a VIP day to your retreat participants after or on the last day of the retreat?

Think about what you could offer to your participants that would continue to support the transformation they just experienced on your retreat.

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- Stay connected as a group.

Creating a Facebook group just for your retreat participants is a great way for you all to stay connected after the retreat. You can also hold regular Zoom calls on a quarterly or monthly basis.

Think of some ways you can support your participants to stay connected to each other and to the energy of the retreat.

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- Send out a participant feedback survey.

One of the best ways to get honest feedback from your participants about your retreat is to send them out an anonymous survey. This information can be very helpful to you in planning your next retreat. Survey Monkey is a great website where you can create a free 10 question survey.

Will you send out a survey?

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## After the Retreat – Follow Up

- Send out a participant feedback survey.

Here are some sample survey questions:

**What did you gain/learn on this retreat?**

**What did you experience and take away on this retreat that you could not get otherwise?**

**What did you like most about the retreat?**

**Is there anything you would have liked to see, do or experience differently on the retreat?**

**What did you like most about your retreat leader?**

**Would you go on another retreat with the retreat leader?**

**Were your expectations for the retreat met? If not, why not?**

**Is there anything that you did not like about the retreat or retreat leader?**

**What was your biggest benefit from coming on this retreat?**

**What would you tell somebody who is thinking about going on this retreat? Why should they go?**

**Is there anything else you would like to share your experience on this retreat?**

List some of your own questions.

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- Start planning your next retreat!

When, where what will your next retreat be about?

Start writing out your ideas for your next retreat!

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Get your free **Create your Dream Retreat Planning Guide**

This free report reveals...

- Everything you need to know to begin planning your ideal retreat.
- How to avoid overwhelm with an easy template to follow to create your dream retreat for your clients.
- How to create profitable retreats to make a powerful and lasting impact for your clients.

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