Wedding & Event Planning Sheets

Free working edition 0.1 | November 2, 2026 | David Tom Publishing

A standalone educational working guide for general US readers. Examples are fictional unless explicitly described as source references. Use the guide for one manageable task and keep its supporting records with it.

Print and write by hand, or use the editable Word file. The PDFs are not fillable. Use aliases and private record locations; omit passwords, access codes and full identification/account numbers. Label continuation pages with the sheet code, question and date.

Reader, physical-print, native Word and assistive-technology acceptance remain open. PDFs are untagged; no PDF/UA compliance, professional signoff, or tested classroom outcome is claimed. Try a sample page before a full print run.

Give the event a clear purpose

Write one sentence describing the gathering and one sentence describing the experience you want guests to have. Then identify the practical boundaries: attendance, location, available time, and spending assumptions. A small event can be successful without acquiring every feature offered by a vendor package.

Keep these sheets focused on the event. Household benefits, names, and the first married year belong in the engagement workbook. Cross-reference a shared date or decision rather than copying an entire household plan into the event folder.

Compare complete quotes

Use the same attendance and service assumptions when comparing options. Record what each quote includes and which charges remain separate or unknown. A lower headline price may simply describe a smaller scope.

Distinguish total price, deposit paid, and balance remaining. Ask what happens if attendance or timing changes, and retain the provider's actual answer. This worksheet does not invent a cancellation rule or turn an estimate into a contract.

Worked case: attendance changes the balance

A fictional meal for forty guests is quoted at $18 per person, plus a $60 delivery charge. For this exercise, those are the only charges and all otherwise applicable amounts are assumed included. The total is $780. A $200 deposit leaves a $580 balance.

The final guest count rises to forty-five. The same fictional pricing produces $810 for meals plus $60 delivery, or $870 total. With the same deposit already paid, the balance is $670. The $90 increase comes from five additional meals. Adding the deposit to $870 would count it twice.

In a real comparison, record whether taxes, service charges, equipment, staffing, or other items are included before using the total. Do not copy this simplified price structure into a real event without checking its terms.

Write a schedule someone else can run

Use an action, a time, an owner, and a completion check. “Food arrives” is a milestone, but “Casey receives the delivery, checks it against the agreed list, and contacts the provider if an item is missing” is a handoff.

Build a fictional sequence to test the page: room access at 2:00, setup review at 2:30, delivery window at 3:00, guest welcome at 4:00, and cleanup assignment after the gathering. These are sample times, not recommendations. The organizer should replace them with confirmed arrangements.

Keep an exception route beside the schedule. Who can authorize a change? Who contacts the provider? What should the helper do when the usual decision-maker is unavailable? A narrow authority statement can prevent a routine problem from becoming an improvised commitment.

Close the record after the guests leave

Reconcile final invoices, return borrowed items, and keep a list of unresolved questions. Record lessons about the instructions rather than simply whether the event felt successful. “The delivery contact was missing from the handoff” gives the next organizer something useful to improve.

Use the sheets for one complete cycle

Begin with one bounded question or task. Read the fictional example before entering your own information. Use the first sheet to record the current situation and its evidence, then use the second to check the follow-up. If the answer is unknown, keep it unknown and name the next source or action.

Give every supporting record a stable reference. Keep an earlier observation when later information changes it; add the new date and explanation. A request, a planned action and a confirmed outcome are different states. Close the cycle only as far as the evidence allows.

Try the handoff with the fictional case first: another reader should be able to identify the question, the supporting record and the unfinished step. Record any instruction they cannot follow without explanation. This exercise improves the guide; it does not certify the broader product or process.

EVT-01 — Complete quote and handoff

Short notes are enough. Use a labeled continuation for longer answers; keep supporting records in their private location.

Event purpose, attendance basis and confirmed location

Provider scope, quote version and included/excluded charges

Total, deposit credited, remaining balance; unknown adjustments

Action time/window and confirmation source

Responsible person and approved contact route

Completion check; who can authorize an exception

Borrowed items, return owner and unresolved closing issue

EVT-02 — Run sheet and closing record

Short notes are enough. Use a labeled continuation for longer answers; keep supporting records in their private location.

Time/window and source of confirmation

Action and named owner

Expected delivery/item and check

Exception decision-maker and agreed limits

Final invoice reconciliation and borrowed-item return

Open issue and next contact

Sources and keeping useful records

Editorial basis: the existing DTP writing collection, expanded into standalone guide and worksheet pages. Original fictional examples remain labeled; no external source endorses them.

This guide uses original organizing and teaching material. It supplies no jurisdiction-specific deadlines, legal permission, professional finding or institutional curriculum alignment.

Keep one current master record. Preserve meaningful revisions and carry open questions forward. Related editions and updates: davidtompublishing.com/books-and-publications/.