THE COMPLETE GUIDE TO SORTING AND ORGANIZING INHERITED JEWELRY

A step-by-step handbook for families, heirs, executors, and collection owners

SECURE | PHOTOGRAPH | SORT | INVENTORY | REVIEW | DECIDE

Estate Jewelry Exchange USA
172 N Tustin St #301 | Orange, CA 92867
714-388-6471 | www.estatejewelryexchangeusa.com
Private appointments scheduled in advance

Educational guide - not a formal appraisal, legal opinion, tax opinion, or probate instruction.

Contents

How to Use This Guide	16. Preserve Paperwork, Boxes, and Provenance
1. Secure the Collection Before You Sort It	17. A Room-by-Room Search Checklist
2. Photograph the Collection Before Rearranging It	18. Separate Sentimental Decisions From Financial Decisions
3. Build a Safe Sorting Workspace	19. Independent Appraisal, Buyer Review, Auction Estimate, or Estate Sale?
4. The First-Pass Sort: Use Broad Categories	20. Tax and Estate Records: Why Organization Helps
5. Personal and Sentimental Jewelry	21. Decide What Happens Next
6. Fine-Jewelry Candidates and Metal Marks	22. Preparing Jewelry for a Private Buyer Appointment
7. Sterling Silver, Native Jewelry, and Silver-Tone Pieces	23. A Workflow for Very Large Collections
8. Watches: Keep the Small Parts and Papers	24. Common Mistakes to Avoid
9. Signed Vintage and Designer Jewelry	25. Frequently Asked Questions
10. Costume Jewelry Is a Real Category, Not a Discard Pile	26. Printable Master Checklist
11. Matching Sets, Pairs, and Single Earrings	27. Inventory Worksheet
12. Broken, Damaged, and Incomplete Jewelry	28. Family Decision Worksheet
13. How to Untangle Necklaces Safely	29. Appointment Preparation Worksheet
14. Cleaning: Why Sorting Comes First	30. About Estate Jewelry Exchange USA
15. Create a Useful Inventory	Sources and Important Limitations

Use this guide in order for a new collection, or jump to the section that addresses your immediate question.

How to Use This Guide

Inherited jewelry is rarely a neatly labeled group of valuables. It is more often a mixture of personal keepsakes, fine jewelry, costume jewelry, watches, single earrings, broken chains, boxes, receipts, and stories. The purpose of this guide is to help you gain control of that mixture without forcing immediate decisions.

The method is deliberately staged. You will first secure and document the collection. You will then create broad groups, preserve information, and make a usable inventory. Only after the collection is organized will you decide what may need a family conversation, an independent appraisal, a buyer review, repair, donation, or long-term storage.

You do not need to identify every gemstone or calculate a price before you begin. In fact, trying to do everything at once is one of the most common causes of confusion. Organization is the first objective. Valuation and disposition come later.

The six-step method: SECURE -> PHOTOGRAPH -> SORT -> INVENTORY -> REVIEW -> DECIDE

1. Secure the Collection Before You Sort It

Move the jewelry to a location that is private, dry, stable, and easy to control. Avoid a kitchen counter, open garage, busy hallway, or room where children, pets, visitors, cleaners, or estate-sale shoppers may enter. A locked room, locked cabinet, or monitored workspace is preferable when the collection is substantial.

If the jewelry belongs to an estate, confirm who is authorized to handle it. A family member who physically possesses a box may not have authority to distribute or sell its contents. The executor, trustee, personal representative, surviving owner, or attorney may need to direct the process. When authority is uncertain, stop before making irreversible decisions.

Do not invite several people to begin selecting pieces before photographs and an inventory exist. Even a well-intentioned informal distribution can create disagreements later because no one remembers exactly what was present or who received a particular item.

Record the date, location, and name of the person who collected the jewelry. If pieces came from several rooms or containers, keep those groups separate during the first stage. A jewelry box from a bedroom may contain a different set of items and documents than a safe-deposit envelope or a dresser drawer.

CHECKLIST

[ ] Move jewelry to a controlled workspace.

[ ] Confirm who has authority to make decisions.

[ ] Limit access until the collection is documented.

[ ] Record where each box or group was found.

[ ] Keep separate sources separate during the first review.

[ ] Use a simple sign-in note if several authorized people handle the collection.

2. Photograph the Collection Before Rearranging It

Take overview photographs before you remove pieces from boxes, trays, bags, or drawers. These first images are not intended for marketing. They are a record of the collection as found. Photograph the front, interior, labels, and contents of each container.

Include photographs of handwritten notes, old envelopes, jewelry-store boxes, repair tags, watch papers, grading reports, and appraisal documents. A small note such as 'Grandma's anniversary ring' may be financially unimportant but emotionally essential. A repair envelope may carry a serial number or description that connects a loose item to its history.

Use consistent image names. For example, Box-A-Overview, Box-A-Tray-1, Box-A-Documents, and Box-A-Loose-Items. When you later assign inventory numbers, these photographs will help reconstruct the original grouping.

Do not rely on cloud storage alone. Save a second copy of the photographs to another secure location. For a large or contested estate, preserve the original image files and avoid filters or edits that could create questions about what was shown.

CHECKLIST

[ ] Photograph each container before opening or rearranging it.

[ ] Take wide shots and close-ups.

[ ] Include labels, notes, receipts, and boxes.

[ ] Use consistent file names.

[ ] Back up the photographs.

[ ] Do not apply color-changing filters.

3. Build a Safe Sorting Workspace

A suitable workspace reduces loss and damage. Use a clean table with a light-colored, non-slip surface. A white cotton sheet, jewelry mat, or clean towel can make small stones and components easier to see. Close floor vents, keep drinks away, and work over a surface rather than over carpet or a sink.

Good lighting matters. Use bright, indirect light that shows color without creating harsh reflections. A desk lamp aimed through a white shade or diffuser can help. Keep a magnifier nearby, but do not let magnification tempt you into making unsupported identifications.

Prepare more containers than you think you need. Shallow trays are useful for broad groups. Small resealable bags are useful for individual pieces, loose components, and single earrings. Acid-free tissue can help cushion delicate items. Never let adhesive touch pearls, enamel, plating, paper labels, or fabric boxes.

Use a numbered tag system rather than long handwritten descriptions on tiny bags. A bag marked 0047 can connect to inventory row 0047, where you can enter photographs, measurements, marks, condition, and next steps.

- Shallow trays or clean boxes
- Small resealable bags in several sizes
- Acid-free tissue or soft pouches
- Numbered paper tags
- Notebook, spreadsheet, or inventory app
- Ruler and flexible measuring tape
- Soft dry cloth and very soft brush
- Phone or camera with charger
- Magnifier or loupe
- Containers labeled Keep Together, Needs Review, Damaged, and Paperwork

4. The First-Pass Sort: Use Broad Categories

The first pass is about control, not expertise. Work quickly enough that the project keeps moving, but gently enough that you do not break clasps, lose stones, or separate related pieces. When you are uncertain, place the item in Needs Review rather than forcing it into a category.

Use broad categories that are visually and practically useful. Fine-jewelry candidates can be one group. Sterling and silver-marked items can be another. Watches, signed vintage jewelry, costume jewelry, matching sets, sentimental pieces, damaged pieces, and unknown items can each have their own tray.

A broad category does not make a final claim. A ring in the fine-jewelry candidate tray is not proven to be gold or diamond. A brooch in the costume group is not proven to be inexpensive. The label describes what should happen next, not what the item is worth.

- Personal and sentimental items
- Fine-jewelry candidates
- Sterling silver and silver-marked pieces
- Watches and watch accessories
- Signed vintage and designer jewelry
- Unsigned costume and fashion jewelry

- Matching sets and pairs
- Native or Southwestern-style jewelry
- Broken, damaged, and incomplete pieces
- Unknown items requiring professional review

5. Personal and Sentimental Jewelry

Sentimental value should be identified early because it does not follow ordinary resale logic. A financially modest locket may be the only item a grandchild remembers. A wedding band, religious medal, service pin, school ring, or charm bracelet may carry family history that cannot be replaced after a sale.

Create a sentimental hold group. Photograph every item in that group and record who recognized it, what story was provided, and whether a family member requested it. Do not interpret a request as an automatic right to take the item. The will, trust, executor, or ownership agreement may control distribution.

Where possible, collect stories in writing. Note the name of the wearer, approximate dates, special events, and any family photographs showing the piece. This documentation may become more meaningful than a financial estimate and can accompany the jewelry when it is eventually passed down.

When multiple people want the same piece, slow the process down. Possible approaches include rotation, drawing lots, an appraisal followed by equalization, a family buyout, or sale and division of proceeds. The appropriate method depends on the estate documents and local law.

6. Fine-Jewelry Candidates and Metal Marks

Fine-jewelry candidates include pieces that appear to contain precious metal, diamonds, colored gemstones, or high-quality manufacturing. Look inside rings, on clasps, behind pendants, and on earring posts for marks. Common marks may include 10K, 14K, 18K, 22K, 585, 750, 900, 950, PT, or PLAT. These marks are clues, not proof.

A stamp can refer to only part of a piece, and components such as clasps, solder, pins, or replacements may differ from the main body. Marks can also be worn, incorrectly read, or fraudulent. Home acid testing, scraping, filing, or destructive testing is not appropriate for an heir who is simply organizing the collection.

Do not guess gemstone identities from color. Clear stones are not automatically diamonds, red stones are not automatically rubies, and green stones are not automatically emeralds. Record visible features neutrally and leave identification to a qualified professional when it matters.

Keep ring guards, sizing beads, detached stones, extra links, and old settings with the item or inventory number they may belong to. A tiny component can be important to repair, provenance, or completeness.

7. Sterling Silver, Native Jewelry, and Silver-Tone Pieces

Create a separate group for items marked sterling, 925, coin, or with other possible silver marks. Also separate Native and Southwestern-style jewelry when it shows turquoise, coral, shell, hand-stamped metalwork, pictorial hallmarks, or maker initials. Avoid assigning tribal origin or artist attribution without reliable evidence.

Tarnish is not a reason to discard silver. It is also not a command to polish it. Aggressive polishing can remove patina, plated surfaces, darkened design detail, maker information, or material that helps a specialist understand age and construction.

Silver-tone costume jewelry belongs in a separate category unless a mark or professional test indicates otherwise. A magnet may provide a clue, but nonmagnetic does not mean silver, and magnetic components do not necessarily mean the entire item lacks precious metal.

Store turquoise, coral, shell, and other porous materials away from chemical cleaners. Keep each piece separated enough that hard metal edges cannot scratch softer stones.

8. Watches: Keep the Small Parts and Papers

Watches should be handled as their own project. Record the brand name, dial markings, case markings, reference numbers, serial numbers, band type, and whether the watch is running. Do not force crowns, pushers, bezels, case backs, or stiff clasps.

Keep original boxes, warranty cards, receipts, service papers, booklets, extra bracelet links, straps, buckles, and tags with the watch. A watch that appears incomplete may become complete when an envelope of links is found elsewhere in the home.

Do not install a battery in an unfamiliar vintage watch simply to test it. The wrong procedure can damage a case, gasket, movement, dial, or hands. A leaking old battery should be handled carefully by someone familiar with watches.

If several watches are present, bag and number each watch separately. Do not let metal bracelets rub against dials or cases during transport.

9. Signed Vintage and Designer Jewelry

Search for names and symbols on the back of brooches, on necklace tags, inside bracelets, on earring clips, and near clasps. Use a magnifier and photograph the mark. Do not polish the area aggressively to make the mark more visible.

Signed costume jewelry can attract collector interest, but a famous name does not make every piece rare or highly valuable. Design, age, condition, color, completeness, authenticity, and current demand all

matter. Conversely, an unsigned piece should not be dismissed. Some desirable jewelry was never marked or lost its original paper tag.

Keep signed pieces with matching earrings, necklaces, bracelets, boxes, and tags. If an old card carries a name, do not assume every loose item on the card originally belonged there; photograph the arrangement and make a note rather than treating it as proven.

Avoid using a single active online listing as a value. Online sellers can ask any price. Completed comparable sales are more informative, but accurate comparison requires the same maker, design, size, color, condition, and completeness.

10. Costume Jewelry Is a Real Category, Not a Discard Pile

Costume jewelry may include rhinestone brooches, faux pearls, glass beads, enamel bracelets, clip-on earrings, charm jewelry, figural pieces, and gold-tone or silver-tone designs. It was often purchased for fashion rather than metal value, but that does not mean it lacks collector or resale interest.

Separate visually strong, well-made, older, signed, unusual, figural, or complete pieces from common modern fashion jewelry. Keep matching sets together. Look for quality clues such as prong-set stones, detailed backs, unusual glass, complex construction, articulated parts, and secure clasps. These clues do not establish value, but they can justify closer review.

Do not throw away a piece because one stone is missing or the pin is bent. Some collectors restore rare designs. Others purchase components or single earrings to complete a set. Place damaged costume jewelry in its own labeled group.

Avoid water and chemical cleaners on unknown costume jewelry. Foil-backed rhinestones, glued stones, plated finishes, faux pearls, and painted details may be permanently damaged by soaking or abrasion.

11. Matching Sets, Pairs, and Single Earrings

Completeness matters. A necklace with its original earrings, a brooch with matching clips, a complete cufflink pair, or a bracelet suite may be more useful and desirable than isolated components. During the first pass, create a visible set-building area.

When you find a single earring, photograph it and assign a number. Store all unmatched earrings in organized compartments rather than one tangled bag. At the end of the first sort, compare shapes, backs, stones, and construction to locate possible mates.

Do not force two similar-looking pieces into a set. Slight differences in color, size, metal finish, or construction may show that they were not originally paired. Label them as possible matches until you have better evidence.

Keep replacement stones, detached drops, charms, and findings in numbered bags. A small blue stone that looks insignificant may fit a visible empty setting in another piece.

12. Broken, Damaged, and Incomplete Jewelry

A damaged-items category protects the collection from two opposite mistakes: throwing away useful material and mixing sharp or unstable pieces with wearable jewelry. Use separate bags for broken chains, loose stones, bent pins, detached clasps, watch parts, single earrings, and unidentified fragments.

Record the type of damage without trying to repair it. Useful notes include missing stone, clasp broken, chain separated, pearl strand weak, pin bent, enamel loss, green surface residue, loose setting, and unknown detached part.

Do not use household glue, soldering tools, abrasive polishing, or replacement stones before the item is identified. An amateur repair can reduce collectibility, conceal evidence, or make professional restoration more difficult.

Green corrosion or residue on costume jewelry should be isolated so it does not transfer to other pieces. Handle gently and wash your hands after contact. When an item is sharp, leaking, moldy, or contaminated, use appropriate protective measures and professional advice.

13. How to Untangle Necklaces Safely

Lay the tangle on a padded surface under bright light. Find every clasp, pendant, and fragile section before applying pressure. Close open clasps when possible so they do not hook other chains. Work from the loosest outer loops toward the center.

Use fingertips or a blunt wooden toothpick to open knots gradually. Avoid steel needles, knives, or pulling the ends apart, which can scratch metal, break links, stretch stringing material, or damage a clasp.

If a pearl strand, delicate antique chain, or stone-set necklace is trapped in a tight knot, stop. Photograph and bag the tangle as one group. Paying for careful separation may be cheaper than repairing a broken heirloom.

Once separated, close clasps and store necklaces individually. Long chains can be laid flat in tissue, placed in long bags, or fastened around a clean card designed for jewelry storage. Keep pendants from striking one another.

14. Cleaning: Why Sorting Comes First

Inherited jewelry should generally be sorted before it is cleaned. You may not know whether a stone is treated, porous, glued, fractured, foil-backed, coated, or sensitive to heat. You may not know whether the metal is solid, plated, filled, painted, lacquered, or deliberately oxidized.

The Gemological Institute of America advises that ultrasonic cleaning is best left to professionals who understand gem materials and settings. GIA also advises that pearls should not be placed in ultrasonic or steam cleaners. Harsh chemicals, perfume, hairspray, abrasives, and extreme dryness can also harm pearl surfaces or stringing.

For the organization stage, remove only loose dust with a very soft dry cloth or brush. Do not soak unknown jewelry. Do not use toothpaste, baking soda, vinegar, bleach, ammonia, silver dip, steam, or an ultrasonic unit as a universal solution.

A piece does not need to look newly polished in order to be photographed, inventoried, appraised, or shown to a buyer. Condition should be visible and honestly described. When cleaning is appropriate, the method should match the materials and purpose.

When you do not know the materials, the safest cleaning decision is usually to wait.

15. Create a Useful Inventory

A practical inventory connects the physical item, photographs, paperwork, family history, and next decision. It can be created in a notebook, spreadsheet, database, or printed worksheet. Consistency matters more than technology.

Assign each item or logical group a unique number. Put that number on the bag, tray card, or box - never directly on the jewelry. Photograph the item beside the number. Enter a neutral description and visible marks.

Neutral wording protects accuracy. Use 'yellow metal ring marked 14K with clear center stone' rather than '14K diamond ring' until the metal and stone are verified. Use 'white bead necklace, possibly pearl' rather than making a firm identification from appearance.

Condition notes should be factual: one blue stone missing, clasp opens, pin bent, surface scratches, green residue, strand appears weak, watch not tested. Avoid value judgments such as worthless, expensive, or rare unless supported by qualified evidence.

- Inventory number
- Original location or box
- Item type
- Neutral visual description
- Visible marks or signatures
- Measurements
- Weight, only if measured accurately
- Condition notes
- Matching pieces or loose parts
- Box, papers, or accessories
- Known family history

- Requested by family member
- Planned next step
- Disposition date and documentation

16. Preserve Paperwork, Boxes, and Provenance

Paperwork and packaging should be treated as part of the collection. Keep receipts, grading reports, old appraisals, insurance schedules, repair envelopes, warranty cards, watch records, designer pouches, branded boxes, hang tags, and handwritten notes.

An old insurance appraisal is not necessarily a current selling price. It may have been written for replacement coverage, may use retail assumptions, and may be outdated. Even so, it can contain useful measurements, gemstone descriptions, serial numbers, photographs, and manufacturer information.

Match documents carefully. An appraisal describing a 1.02-carat round stone should not be attached to a different-looking ring simply because both were found in the same drawer. Use item numbers and photographs to show what is known and what remains uncertain.

Family photographs can also provide provenance. Save a copy of an image showing the owner wearing the jewelry and record the date or event when known. Do not claim famous ownership or historical significance without evidence.

17. A Room-by-Room Search Checklist

Jewelry is often stored outside the main jewelry box. Before concluding that a set is incomplete or paperwork is missing, search likely storage areas with authorization. Keep a record of which spaces were checked.

Use caution around medications, weapons, personal records, and private documents. The search should be directed by the authorized estate representative and conducted respectfully.

CHECKLIST

[ ] Jewelry boxes, trays, and dresser drawers

[ ] Nightstands and bedside tables

[ ] Closet shelves, handbags, purses, and luggage

[ ] Coat, robe, and formalwear pockets

[ ] Safes, lockboxes, and safe-deposit records

[ ] Bathroom drawers and cosmetic bags

[ ] Desk drawers, filing cabinets, and receipt folders

[ ] Sewing boxes, craft containers, and button tins

[ ] Watch boxes, eyeglass cases, and small gift boxes

[ ] Kitchen catch-all drawers and coin containers

[ ] Holiday decorations and keepsake boxes

[ ] Vehicle consoles and travel cases

[ ] Storage units and labeled estate cartons

[ ] Photograph albums and family-history files

18. Separate Sentimental Decisions From Financial Decisions

A useful inventory includes two different questions: Who cares about this piece? and What financial process, if any, does this piece require? The answers may not match. A highly sentimental item may have modest market value, while an expensive item may have no emotional claimant.

Invite authorized family members to identify sentimental requests from photographs or an inventory list rather than handling the entire collection at once. Record each request and any family story. Do not promise an item until authority and distribution rules are clear.

Where equality matters, an independent appraisal may help establish a documented value for selected pieces. In other situations, a family may agree to rotate choices, draw numbers, use sentimental priority followed by financial equalization, or sell unwanted items and divide proceeds.

Because inheritance, probate, community property, trusts, and tax rules vary, this guide cannot determine legal ownership or the correct distribution method. Use an attorney, tax professional, or fiduciary when the stakes require it.

19. Independent Appraisal, Buyer Review, Auction Estimate, or Estate Sale?

Different professionals answer different questions. An independent appraiser can provide a written opinion of value for a defined purpose. A buyer reviews jewelry to decide what the buyer is willing to purchase. An auction house estimates how an item may perform in a particular sale. An estate-sale company markets property in the context of a household sale.

These services should not be treated as interchangeable. A formal appraisal for insurance may use replacement value. A family division or estate matter may require fair-market value or another defined standard. A direct purchase offer reflects the buyer's market, costs, risk, and resale plan. An auction estimate is not a guaranteed result.

Jewelers of America recommends considering appraiser qualifications and notes that estate liquidation or settlement circumstances may require particular appraisal purposes. The National Association of Jewelry Appraisers is a professional organization focused on gems and jewelry appraisal. When formal documentation is necessary, ask the appraiser to explain the assignment, value definition, effective date, assumptions, and report format.

A seller does not need a formal appraisal for every ordinary item. The cost and purpose should be weighed against the likely usefulness of the report. For mixed collections, an initial sorting and professional review may help identify which few pieces deserve formal appraisal.

- Independent appraisal: documented opinion for a stated purpose
- Buyer review: decision whether to make a purchase offer
- Auction estimate: expected range for a specific auction setting
- Estate sale: sale of property as part of a household liquidation
- Consignment: payment after an item sells under agreed terms

20. Tax and Estate Records: Why Organization Helps

The IRS explains that property received by gift and property received by inheritance can have different basis rules, and certain inherited-property values may need to be consistent with estate-tax reporting. The correct treatment depends on the facts and documents. Jewelry organizers should not attempt to solve tax questions by guessing a purchase price.

Preserve dates, estate documents, appraisals, receipts, sale contracts, payment records, and itemized inventories. If jewelry will be sold, donated, or distributed, ask the estate's tax professional what records are required and whether a date-of-death appraisal or other valuation is appropriate.

A buyer's offer is not automatically a tax appraisal. A decades-old insurance appraisal is not automatically a date-of-death fair-market valuation. A family estimate written in a spreadsheet is not automatically sufficient documentation. The purpose and effective date matter.

This guide provides organization guidance only. Consult a CPA, enrolled agent, attorney, or qualified appraiser for advice tailored to the estate and transaction.

21. Decide What Happens Next

Once the jewelry is secure, photographed, sorted, and inventoried, assign a next-step status. This prevents pieces from drifting back into an unorganized box and allows several decisions to move forward at different speeds.

A Keep status means the authorized owner intends to retain the item. Family Decision means no action occurs until requests or distribution are resolved. Independent Appraisal means formal documentation may be required. Professional Review means identity or significance is uncertain. Sell means the owner is ready to consider an offer. Repair or Redesign means a person intends to use the jewelry. Donate means documentation and recipient suitability should be checked. Store means the decision is postponed but the item remains controlled.

Set a review date for postponed items. A labeled, photographed container is far safer than returning everything to a mixed bag with no plan.

- KEEP
- FAMILY DECISION
- INDEPENDENT APPRAISAL
- PROFESSIONAL REVIEW
- SELL
- REPAIR OR REDESIGN
- DONATE
- STORE AND REVISIT

22. Preparing Jewelry for a Private Buyer Appointment

A buyer appointment should not require days of polishing or speculative pricing. Bring the organized groups, matching sets, watch accessories, and relevant paperwork. Use trays or bags that keep pieces visible and protected. Do not tape jewelry to paper or pile delicate items into a heavy container.

For a large collection, send clear overview photographs before scheduling. Include the approximate number of trays or boxes and note whether the group includes gold, silver, watches, signed vintage jewelry, costume jewelry, Native jewelry, or mixed estate pieces.

Ask how the process works, whether the appointment is private, how payment is made, whether identification is required, whether every item will be considered, and what happens to declined items. Understand whether the business is making a direct purchase, accepting consignment, or providing another service.

Estate Jewelry Exchange USA purchases estate jewelry, inherited jewelry, vintage jewelry, gold, silver, watches, Native jewelry, costume jewelry, and mixed collections by private appointment in Orange County. Jewelry is reviewed as part of the buying process to determine whether it fits current purchasing needs. Not every item qualifies, and there is no obligation to sell.

CHECKLIST

[ ] Confirm authority to sell.

[ ] Keep sentimental holds at home unless they need review.

[ ] Bring available paperwork and accessories.

[ ] Keep sets and pairs together.

[ ] Use separate bags for loose stones and damaged parts.

[ ] Prepare a copy of the inventory, not the only copy.

[ ] Ask for clarity before accepting an offer.

[ ] Document what was sold and the payment received.

23. A Workflow for Very Large Collections

A collection containing hundreds or thousands of pieces should be processed in batches. Trying to spread everything across one room creates new confusion and security risks. Work with one source box at a time and close each batch before opening the next.

Begin with an intake number for the source container. Photograph it, count or estimate the number of pieces, and assign a batch range such as B01-0001 through B01-0100. Sort into broad trays, photograph each tray, and then bag or box items with their assigned numbers.

Use a priority system. Priority A includes sentimental holds, documented fine jewelry, significant watches, unusual signed pieces, and items requiring immediate security. Priority B includes sellable estate, vintage, silver, and costume jewelry. Priority C includes common modern fashion jewelry, craft lots, damaged material, and items awaiting donation or disposal decisions.

Schedule work sessions with a defined start and stop. At the end of each session, reconcile the inventory count, return items to locked storage, back up photographs, and record who participated. Fatigue causes mistakes; a two-hour careful session is better than an exhausting all-day scramble.

24. Common Mistakes to Avoid

The most damaging mistakes usually happen before a professional ever sees the jewelry. People throw away single earrings, separate matching sets, polish away surface detail, mix loose stones together, discard original boxes, give pieces away before creating an inventory, or rely on unsupported online asking prices.

Another common mistake is assuming that everything must follow one path. A collection can be divided by purpose. One important ring may need an independent appraisal. A signed brooch may suit a specialist buyer. Common costume jewelry may be sold in a group. Sentimental items may remain in the family. A watch may go to a watch specialist.

Do not let the perfect become the enemy of the organized. Your first inventory can be simple. Your first descriptions can be neutral. The goal is to preserve options and information.

CHECKLIST

[ ] Do not clean unknown jewelry aggressively.

[ ] Do not discard broken pieces or single earrings.

[ ] Do not separate sets, papers, boxes, or watch links.

[ ] Do not guess gemstones or metal content in official records.

[ ] Do not use active online asking prices as proof of value.

[ ] Do not distribute estate property without authority.

[ ] Do not present a buyer's offer as an independent appraisal.

[ ] Do not place the entire collection in an unsecured public sale without review.

25. Frequently Asked Questions

What should I do first? Secure the jewelry, photograph it as found, preserve its containers and paperwork, and confirm who has authority to make decisions.

Should I sort by color or by value? Sort first by practical category and next action. Color can help organize costume lots later, but it should not be used as a substitute for material or professional review.

Should I separate gold from costume jewelry? Create a fine-jewelry candidate group, but do not assume visual appearance proves metal content. Use Needs Review for uncertain items.

Can a stamp prove an item is gold? A stamp is a clue, not conclusive proof. It may be incomplete, worn, altered, or refer to only part of the item.

Can I use a magnet? A magnet can provide limited sorting clues, but it cannot prove that an item is gold, silver, or valuable.

Should I throw away single earrings? No. Bag and number them. The mate may be found later, and the remaining piece may still have material, repair, or collector use.

What do I do with loose stones? Place each stone or related group in a separate numbered bag and note where it was found. Do not mix all loose stones together.

Should I polish tarnished silver? Not automatically. Polishing may remove patina or detail and may harm plated or mixed-material pieces.

Can I soak costume jewelry? Usually not when the materials are unknown. Water can damage glue, foil backs, plating, stringing, and finishes.

Can pearls go in an ultrasonic cleaner? GIA advises that pearls should not be cleaned in ultrasonic or steam cleaners.

What if necklaces are badly tangled? Work slowly on a padded surface. If delicate pieces are tightly trapped, photograph and bag the tangle for professional help.

Do original boxes matter? They can. Boxes may support identification, provenance, completeness, and collector presentation. Preserve them even when uncertain.

Is costume jewelry worth organizing? Yes. Some pieces have collector interest because of maker, age, design, quality, condition, or rarity.

Do I need to identify every item? No. Neutral descriptions and clear photographs are enough for the organizational stage.

Do I need an appraisal for every piece? No. A formal appraisal should have a defined purpose and may be most useful for selected items.

Is an insurance appraisal the amount I can sell the jewelry for? Not necessarily. Insurance replacement values and resale outcomes serve different purposes and markets.

Can I sell jewelry without receipts? Often yes, but preserve any records that exist and resolve ownership, estate, or tax requirements with the appropriate professionals.

Should all jewelry go into the estate sale? Not automatically. A separate jewelry review may improve security and help determine whether different channels are more appropriate.

How should I transport jewelry? Use closed, padded, numbered containers. Keep delicate pieces separate and avoid leaving jewelry unattended in a vehicle.

Should I repair items before selling? Usually wait until the item is identified and the likely benefit of repair is understood. Poor repairs can cost more than they add.

Can I redesign inherited jewelry? Yes, after ownership and sentimental decisions are settled and the item has been documented. Consider preserving photographs and original components.

How do I divide jewelry fairly? Inventory first, identify sentimental requests, follow estate documents, and consider independent appraisal or other equalization methods when appropriate.

What if family members disagree? Stop irreversible actions and involve the executor, trustee, mediator, attorney, or other appropriate professional.

What records should I keep after a sale? Keep the item number, description, photographs, buyer or transaction record, date, amount, and payment documentation.

Can I donate inherited jewelry? Yes, but discuss valuation and documentation requirements with a qualified tax professional when a deduction is involved.

What if I have no idea what anything is? That is common. Broadly sort, photograph marks, preserve paperwork, and use a professional for the items that need identification.

26. Printable Master Checklist

CHECKLIST

[ ] Authority to handle the jewelry has been confirmed.

[ ] The original containers and locations were photographed.

[ ] A secure sorting area was prepared.

[ ] Boxes, receipts, appraisals, tags, and papers were preserved.

[ ] Sentimental pieces were placed on hold.

[ ] Matching sets and pairs were kept together.

[ ] Watches were grouped with links, boxes, and papers.

[ ] Single earrings and loose stones were bagged and numbered.

[ ] Broken jewelry was retained and labeled.

[ ] Unknown items were placed in Needs Review.

[ ] No aggressive cleaning was performed.

[ ] A neutral inventory was created.

[ ] Photographs were backed up.

[ ] Family requests were recorded without premature distribution.

[ ] Items requiring formal appraisal were identified.

[ ] Items ready for buyer review were separated.

[ ] Sale, donation, repair, and storage decisions were documented.

[ ] Transaction and tax records will be retained.

27. Inventory Worksheet

Use one line per item or logical group. Continue on additional pages as needed.

Inventory No.: _____ Original Location: _____

Item Type: _____ Date Recorded: _____

Neutral Description: _____

Visible Marks or Signatures: _____

Measurements: _____ Condition: _____

Matching Pieces / Loose Parts: _____

Box / Papers / Accessories: _____

Known Family History: _____

Requested By: _____ Authority Confirmed: Yes / No

Next Step: Keep / Family Decision / Appraisal / Review / Sell / Repair / Donate / Store

Disposition Notes: _____

28. Family Decision Worksheet

Item or Inventory Number: _____

Why the Item Is Sentimental: _____

Family Members Requesting It: _____

Will, Trust, or Written Direction: _____

Does Formal Valuation Appear Necessary? Yes / No / Unsure

Agreed Method: Direct Distribution / Rotation / Buyout / Equalization / Sale / Other

Decision and Date: _____

Signatures or Record Location: _____

Use this worksheet as an organizational aid only. It does not replace estate documents or legal advice.

29. Appointment Preparation Worksheet

Approximate Number of Pieces or Containers: _____

Main Categories: Gold / Silver / Watches / Vintage / Costume / Native / Mixed

Photographs Sent in Advance: Yes / No

Paperwork Available: Receipts / Appraisals / Reports / Watch Papers / None

Authority to Sell Confirmed: Yes / No

Items Excluded From Sale: _____

Questions for the Buyer: _____

Offer Accepted or Declined: _____

Items Sold: _____

Payment Method and Record: _____

30. About Estate Jewelry Exchange USA

Estate Jewelry Exchange USA purchases estate jewelry, inherited jewelry, vintage jewelry, jewelry collections, gold, silver, watches, Native jewelry, costume jewelry, rings, brooches, necklaces, bracelets, earrings, and mixed jewelry lots by private appointment in Orange County.

Appointments are scheduled in advance at the private office in Orange. Qualifying on-site estate visits may be available when collections are larger, travel is difficult, or the jewelry needs to remain at the property. Jewelry is reviewed as part of the buying process to determine whether it fits current purchasing needs.

The business does not operate as a walk-in retail store. Not every item or collection qualifies, and there is no obligation to sell. Offers, when made, are based on the collection, condition, resale demand, and current market conditions at the time of review.

Estate Jewelry Exchange USA
172 N Tustin St #301
Orange, CA 92867
Phone: 714-388-6471
Website: www.estatejewelryexchangeusa.com
Private appointments: Monday-Sunday, 9:00 AM-6:00 PM

Sources and Important Limitations

This guide provides general organizational information. It is not a formal jewelry appraisal, gemological report, legal opinion, tax opinion, probate instruction, insurance recommendation, or guarantee that any item will be purchased.

Jewelry care guidance was informed by the Gemological Institute of America's articles on jewelry care, pearl care, and ultrasonic cleaners. Appraisal distinctions were informed by Jewelers of America, the National Association of Jewelry Appraisers, and American Society of Appraisers educational material. General inheritance and basis references were informed by the Internal Revenue Service Gifts & Inheritances FAQ, Publication 551, and Publication 559.

Rules, tax treatment, professional standards, markets, and business purchasing needs can change. Consult the correct qualified professional for decisions involving ownership, taxes, insurance, formal valuation, family disputes, charitable deductions, or estate administration.

Private Appointment Information

READY TO DISCUSS AN ESTATE OR INHERITED JEWELRY COLLECTION?

Estate Jewelry Exchange USA
172 N Tustin St #301
Orange, CA 92867

Phone: 714-388-6471
www.estatejewelryexchangeusa.com

Private appointments are scheduled in advance.
In-office appointments and qualifying on-site estate visits may be available.

Jewelry is reviewed as part of the buying process. Not every item or collection qualifies, and there is no obligation to sell. Offers are based on the items, condition, resale demand, and current market conditions at the time of review.