MOVING A PARENT INTO ASSISTED LIVING

Jewelry and Valuables Guide

A practical workbook for parents, adult children, caregivers, senior move managers, and authorized representatives

Estate Jewelry Exchange USA

Private office and qualifying on-site appointments in Orange County

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How to Use This Guide

Keep this workbook with the moving, family, or fiduciary records.

This guide is designed to help families slow the process down, protect the parent's choices, and keep jewelry from becoming mixed with moving boxes, donations, cleanout property, or informal family distributions.

The central rule

The jewelry continues to belong to the parent unless ownership has been transferred through an appropriate gift, sale, trust, court, or other valid process.

Helping with the move does not automatically give an adult child, caregiver, organizer, or facility employee authority to sell the parent's property.

Recommended order

1. Discuss the parent's wishes and preferred level of family help.
2. Confirm ownership and who may authorize a sale.
3. Gather jewelry before movers, cleaners, or donation services enter the home.
4. Separate jewelry into clear decision groups.
5. Ask the assisted-living community about storage and resident-property procedures.
6. Create a move-in inventory for the jewelry traveling with the parent.
7. Arrange a private office or approved on-site appointment for jewelry approved for possible sale.
8. Document the sale, gifts, storage decisions, and jewelry brought to the new residence.

Important note

This workbook provides general organizational information. It is not legal, medical, capacity, power-of-attorney, conservatorship, trust, tax, accounting, insurance, assisted-living, elder-abuse, ownership, or formal appraisal advice. Questions about authority, capacity, fiduciary duties, resident-property rules, disputed ownership, or financial records should be addressed with appropriately qualified professionals.

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1. Begin With the Parent's Wishes

The move does not require every jewelry decision to be completed immediately.

A parent may want to keep wearing favorite pieces, bring a small jewelry box to the new residence, give selected pieces to family, sell jewelry no longer worn, or leave some decisions for later. Start with the parent's goals rather than the collection's possible selling amount.

Conversation prompts

[ ] Which jewelry do you still wear or want nearby?

[ ] Which pieces have the strongest family meaning?

[ ] Has any jewelry already been promised or gifted?

[ ] Which pieces should stay in secure family storage?

[ ] Which jewelry are you comfortable considering for sale?

[ ] Would you like help from one trusted family member or adviser?

[ ] Would you prefer an office appointment or help at the longtime home?

[ ] Are there any pieces you are not ready to decide about?

Parent Wishes Record

Parent or owner	_____
Date of conversation	_____
People present	_____
Parent's main goal	_____ _____
Parent's concerns	_____ _____
Preferred level of help	[ ] Parent leads [ ] Shared decisions [ ] Authorized representative

Use an undecided group

A piece does not need to be sold simply because the moving deadline is approaching. Jewelry requiring more time can be labeled "Undecided - Not for Sale" and stored securely.

2. Supportive Decision-Making

Help the parent understand and communicate choices without creating pressure.

A supportive approach may include

[ ] Work with one jewelry box or category at a time.
[ ] Use short, clear choices instead of presenting the entire collection at once.
[ ] Allow breaks when the parent becomes tired or overwhelmed.
[ ] Write decisions down and review them before the appointment.
[ ] Keep sentimental or uncertain pieces outside the selling group.
[ ] Use a trusted support person to take notes and remember questions.
[ ] Remind the parent that an offer may be declined.
[ ] Postpone the transaction when meaningful uncertainty remains.

Pressure warning signs

[ ] Rushing the parent because the home must be cleared.
[ ] Removing jewelry without explaining where it is going.
[ ] Keeping the selling amount private from the parent.
[ ] Asking the parent to sign documents that are not understood.
[ ] Pressuring the parent to release a specific keepsake.
[ ] Depositing proceeds into another person's account without proper authority.
[ ] Using memory, medical, or moving stress to influence the decision.

Decision-Support Check	
Parent participated	[ ] Yes [ ] With support [ ] No - authority reviewed
Information explained	[ ] Yes [ ] Needs additional explanation
Parent expressed a consistent choice	[ ] Yes [ ] Uncertain
Trusted support person	_____
Decision postponed when needed	[ ] Yes [ ] Not needed
Notes	_____ _____

3. Ownership and Authority Review

Helping with a move is not the same as having authority to sell.

The person arranging the appointment should understand who owns the jewelry and who may authorize a transaction. A health care document does not automatically provide financial authority over personal property.

Possible decision-makers

- The parent who owns the jewelry
- A properly authorized financial agent
- A trustee acting for trust-owned property
- A conservator acting under a court order
- A professional fiduciary or another properly authorized representative

Questions to confirm

[ ] Is the authority currently effective?

[ ] Does it cover personal property and jewelry?

[ ] Does it permit a sale?

[ ] Must another person, co-trustee, attorney, or court participate?

[ ] Should the parent remain involved in the decision?

[ ] Are special records, deposits, notices, or accountings required?

Authority Record

Jewelry owner	_____
Person arranging appointment	_____
Person authorized to sell	_____
Authority basis	[ ] Owner [ ] Power of Attorney [ ] Trust [ ] Conservatorship [ ] Other
Authority currently effective	[ ] Yes [ ] No [ ] Uncertain
Professional review completed	[ ] Yes [ ] No [ ] Not needed
Restrictions or conditions	_____ _____

4. Jewelry Ownership Check

Jewelry found in the home may belong to the parent, another person, a trust, or a prior recipient.

Keep a piece outside the selling group when

[ ] Another family member claims ownership.
[ ] The parent previously gave or promised the piece to someone.
[ ] The jewelry may belong to a surviving spouse or joint owner.
[ ] The piece appears on a trust or estate schedule.
[ ] The jewelry was borrowed or stored for another person.
[ ] The family is uncertain whether the parent owns it.
[ ] A dispute or professional review is pending.

Available ownership information

[ ] Purchase receipts or account statements
[ ] Insurance schedules or old appraisals
[ ] Trust schedules or personal-property records
[ ] Gift letters or family correspondence
[ ] Engravings and identifying marks
[ ] Photographs showing the jewelry being worn
[ ] Prior distribution or storage records

#	Piece / group	Possible owner	Evidence / notes	Status
1	_____	_____	_____	[ ] Keep [ ] Hold [ ] Sale
2	_____	_____	_____	[ ] Keep [ ] Hold [ ] Sale
3	_____	_____	_____	[ ] Keep [ ] Hold [ ] Sale
4	_____	_____	_____	[ ] Keep [ ] Hold [ ] Sale
5	_____	_____	_____	[ ] Keep [ ] Hold [ ] Sale
6	_____	_____	_____	[ ] Keep [ ] Hold [ ] Sale

When uncertain

Label the item "Ownership Uncertain - Not for Sale" and keep it in secure storage until the issue is resolved.

5. Gather Jewelry Before Movers Arrive

Search before packing, donations, cleanout work, staging, and furniture removal begin.

Room-by-room search checklist

[ ] Jewelry boxes and trays
[ ] Dresser and nightstand drawers
[ ] Closets and shelf boxes
[ ] Purses, cosmetic bags, and wallets
[ ] Coat, robe, and suit pockets
[ ] Desk drawers and filing cabinets
[ ] Safes and lockboxes
[ ] Watch cases and accessory boxes
[ ] Eyeglass cases and travel bags
[ ] Sewing and craft containers
[ ] Small envelopes and paper packets
[ ] Luggage and storage boxes
[ ] Furniture compartments and drawer liners
[ ] Photograph boxes and family records

Do not donate yet

Do not donate purses, clothing, furniture, storage containers, or paperwork until reasonable checks for small jewelry and records have been completed.

Home Search Record	
Search lead	_____
Search date(s)	_____
Rooms completed	_____
Jewelry storage location	_____
People with access	_____
Items still to check	_____

6. Preserve Source Groups

Do not combine every drawer, box, purse, and container into one large pile.

Where jewelry was found can help preserve matching relationships, identify watch accessories, and explain ownership or family history. Use temporary source labels until the first review is complete.

Suggested source labels

- Main bedroom jewelry box
- Nightstand drawer
- Closet safe
- Desk drawer
- Travel jewelry case
- Watch container
- Inherited from a named relative
- Estate cleanout box
- Unknown original location

Container	Original location	General contents	Approx. qty.	Available for review
1	_____	_____	_____	[ ] Yes [ ] No
2	_____	_____	_____	[ ] Yes [ ] No
3	_____	_____	_____	[ ] Yes [ ] No
4	_____	_____	_____	[ ] Yes [ ] No
5	_____	_____	_____	[ ] Yes [ ] No
6	_____	_____	_____	[ ] Yes [ ] No
7	_____	_____	_____	[ ] Yes [ ] No
8	_____	_____	_____	[ ] Yes [ ] No

Container rules

[ ] Use closed containers that cannot spill.

[ ] Use removable labels on the outside container.

[ ] Do not apply adhesive labels directly to jewelry or original boxes.

[ ] Keep documents in a separate protected folder.

[ ] Place loose or sharp parts into smaller labeled containers.

7. The Five Jewelry Decision Groups

Only the group approved for possible sale needs to be presented to a buyer.

Group	Purpose	Examples
1. Moving with parent	Jewelry still worn or wanted nearby	Everyday watch, favorite necklace, religious piece
2. Keepsakes and gifts	Pieces the parent wants retained or given	Wedding jewelry, engraved pieces, promised gifts
3. Approved for sale	Jewelry the owner or authorized person is comfortable presenting	Older watches, vintage jewelry, mixed collection
4. Undecided	Pieces needing more time or discussion	Sentimental items, uncertain gifts, family questions
5. Special review	Authority, ownership, appraisal, or conflict concerns	Trust property, disputed pieces, agent purchase

Decision-group checklist

[ ] The parent understands the five groups.

[ ] Each group is stored separately.

[ ] Containers are labeled clearly.

[ ] The sale group contains only approved jewelry.

[ ] Undecided and special-review pieces are outside the appointment room.

[ ] A family member can explain where each group will be stored.

Suggested labels

Moving With Parent
Family Keepsakes and Gifts
Approved for Possible Sale
Undecided - Not for Sale
Special Review - Not for Sale

8. Family Keepsake and Gift Record

Record the parent's choices before pieces are distributed or packed.

#	Jewelry description	Intended recipient	Decision date	Status
1	_____	_____	_____	[ ] Given [ ] Stored
2	_____	_____	_____	[ ] Given [ ] Stored
3	_____	_____	_____	[ ] Given [ ] Stored
4	_____	_____	_____	[ ] Given [ ] Stored
5	_____	_____	_____	[ ] Given [ ] Stored
6	_____	_____	_____	[ ] Given [ ] Stored
7	_____	_____	_____	[ ] Given [ ] Stored
8	_____	_____	_____	[ ] Given [ ] Stored
9	_____	_____	_____	[ ] Given [ ] Stored

Distribution confirmation

Keepsake and Gift Summary	
Parent or authorized decision-maker	_____
Person maintaining record	_____
Jewelry delivered by	_____
Jewelry received by	_____
Delivery date	_____
Storage location for undelivered gifts	_____
Notes	_____

Avoid informal removal

Even when family members trust one another, recording the parent's wishes and each completed transfer reduces later confusion.

9. Jewelry Approved for Possible Sale

This list is not an appraisal. It is a control record for the private appointment.

#	Neutral description	Container / source	Box or records	Approved
1	_____	_____	_____	[ ]
2	_____	_____	_____	[ ]
3	_____	_____	_____	[ ]
4	_____	_____	_____	[ ]
5	_____	_____	_____	[ ]
6	_____	_____	_____	[ ]
7	_____	_____	_____	[ ]
8	_____	_____	_____	[ ]
9	_____	_____	_____	[ ]
10	_____	_____	_____	[ ]

Before scheduling

[ ] Parent or authorized seller approved the group.

[ ] Family keepsakes and promised gifts were removed.

[ ] Disputed and uncertain property was removed.

[ ] Matching pieces and watch accessories remain together.

[ ] Broken and loose components are protected.

[ ] Available boxes and records were gathered.

[ ] The approximate quantity and number of containers are known.

10. Questions for the Assisted-Living Community

Ask before deciding which jewelry should move with the parent.

[ ] Is secure storage available inside the residence?
[ ] Does the room include a lockable drawer, cabinet, or safe?
[ ] Who can access the resident's room?
[ ] How are valuables documented at move-in?
[ ] Does the community maintain a resident-property inventory?
[ ] What happens when jewelry is added or removed later?
[ ] How should missing property be reported?
[ ] Does the community recommend limiting certain valuables?
[ ] Are staff permitted to help the resident put on or remove jewelry?
[ ] Who should be contacted with questions about resident property?
[ ] Are there insurance recommendations or exclusions to discuss with the family's insurer?
[ ] Can the family receive a copy of any signed property inventory?

Facility Valuables Notes

Community name	_____
Contact person	_____
Telephone / email	_____
Secure storage available	[ ] Yes [ ] No [ ] Limited
Inventory process	_____ _____
Missing-property procedure	_____ _____
Jewelry restrictions or recommendations	_____ _____

11. Move-In Jewelry Inventory

Use neutral descriptions and keep photographs with this record.

#	Description	Photo / mark	Storage location	Date moved in
1	_____	_____	_____	_____
2	_____	_____	_____	_____
3	_____	_____	_____	_____
4	_____	_____	_____	_____
5	_____	_____	_____	_____
6	_____	_____	_____	_____
7	_____	_____	_____	_____
8	_____	_____	_____	_____
9	_____	_____	_____	_____
10	_____	_____	_____	_____

Move-in confirmation

Move-In Record	
Delivered by	_____
Received or acknowledged by	_____
Date and time	_____
Residence storage location	_____
Facility inventory copy received	[ ] Yes [ ] No [ ] Not applicable
Family contact maintaining copy	_____

12. Jewelry Stored Outside the Residence

Record jewelry retained in family storage, a safe, or another controlled location.

#	Jewelry / container	Storage location	Person responsible	Access date
1	_____	_____	_____	_____
2	_____	_____	_____	_____
3	_____	_____	_____	_____
4	_____	_____	_____	_____
5	_____	_____	_____	_____
6	_____	_____	_____	_____
7	_____	_____	_____	_____
8	_____	_____	_____	_____
9	_____	_____	_____	_____

Storage controls

[ ] The parent knows where the jewelry is stored.

[ ] The person responsible is identified.

[ ] Access is limited and documented.

[ ] Original boxes and records are stored safely.

[ ] The family knows how to retrieve the jewelry.

[ ] Undecided pieces remain clearly labeled.

[ ] Future gifts or sales will be added to the record.

Do not rely on memory alone

A move can involve many containers and helpers. A written location record prevents jewelry from becoming "lost" inside family storage.

13. Office or Qualifying On-Site Appointment?

Choose the setting that protects privacy, access, and control of the jewelry.

Office appointment may fit when	On-site request may fit when
The collection is manageable to transport.	The parent has difficulty traveling.
The family prefers not to provide home access.	The collection is large or fills several containers.
The jewelry has already left the longtime home.	The jewelry should remain at the property.
The home is busy or unsuitable for a private meeting.	Transport would create unnecessary risk or confusion.
The seller prefers a confirmed business location.	An authorized representative controls property access.

Appointment request information

Appointment Request Notes	
Preferred appointment	[ ] Office [ ] On-site request [ ] Not sure
Approximate number of pieces	_____
Number of boxes / trays	_____
General collection description	_____
Reason for on-site request	_____
Authorized contact	_____
Telephone	_____

On-site visits are case by case

Availability can depend on the collection, location, travel, access, privacy, security, scheduling, and circumstances.

14. Private Appointment Preparation

Only jewelry approved for possible sale should be in the review area.

[ ] Appointment date and location confirmed.
[ ] Owner or authorized seller will attend.
[ ] One trusted support person identified when helpful.
[ ] Jewelry gathered in secure, closed containers.
[ ] Keepsakes, gifts, disputes, and undecided jewelry removed.
[ ] Matching pieces and watch accessories kept together.
[ ] Original boxes and available records gathered.
[ ] No special cleaning or repair performed.
[ ] For an on-site meeting, a private room and stable table are ready.
[ ] Moving, cleanout, and donation activity near the room is paused.
[ ] Children, pets, and unrelated visitors are kept away.
[ ] Questions are written down before the meeting.

Questions to ask before accepting

[ ] Exactly which pieces are included?
[ ] Is the offer itemized or made for a group?
[ ] Would removing one piece change the amount?
[ ] Are original boxes, documents, or watch accessories included?
[ ] What is the final purchase amount?
[ ] How and when will payment be completed?
[ ] What transaction record will be provided?
[ ] What happens to jewelry not purchased?
[ ] May the seller decline the offer?

15. Offer, Payment, and Transaction Record

Complete this page at or immediately after the appointment.

Private Sale Record

Appointment date	_____
Appointment location	_____
Owner / authorized seller	_____
Support person	_____
Buyer / business	Estate Jewelry Exchange USA
Jewelry presented	_____ _____
Jewelry included in offer	_____ _____
Jewelry excluded / returned	_____ _____
Offer type	[ ] Individual pieces [ ] Selected group [ ] Collection
Final purchase amount	$_____
Offer accepted	[ ] Yes [ ] No
Payment confirmed	[ ] Yes [ ] No
Transaction record received	[ ] Yes [ ] No
Proceeds deposited / recorded	_____

Estate Jewelry Exchange USA pays cash when an offer is accepted and the transaction is completed. Payment should be received and confirmed before the seller leaves the office or before the buyer leaves an approved on-site appointment.

16. Moving-Day Jewelry Checklist

Jewelry should travel separately from ordinary moving boxes.

[ ] Count all jewelry containers before leaving the longtime home.
[ ] Confirm that each container is closed and labeled.
[ ] Keep the inventory with the responsible person.
[ ] Transport jewelry separately from furniture and household boxes.
[ ] Do not place jewelry inside dresser drawers being moved.
[ ] Do not leave jewelry unattended in a vehicle.
[ ] Deliver personal jewelry directly to the new residence.
[ ] Place it into the selected secure storage location.
[ ] Confirm each piece against the move-in inventory.
[ ] Complete any community property documentation.
[ ] Record who delivered and acknowledged the jewelry.
[ ] Move all remaining jewelry to the recorded family storage location.

Moving-Day Control Record

Moving date	_____
Responsible person	_____
Containers leaving longtime home	_____
Containers delivered to residence	_____
Containers placed in family storage	_____
Inventory confirmed	[ ] Yes [ ] No
Facility documentation completed	[ ] Yes [ ] No [ ] Not applicable
Notes	_____ _____

17. Jewelry Found After the Move

A late discovery should be secured before the cleanout continues.

1. Pause work in the immediate area.
2. Place the jewelry in a secure closed container.
3. Record where and how it was found.
4. Search nearby for matching pieces, boxes, and records.
5. Notify the parent or authorized representative.
6. Determine whether it belongs in the move-in, keepsake, sale, undecided, or special-review group.
7. Keep it away from donations, trash, estate-sale property, and general household contents.

After-Move Discovery Record

Date found	_____
Person who found it	_____
Room / exact location	_____
Original container	_____
Neutral description	_____ _____
Person notified	_____
Current secure location	_____
Decision group	[ ] Move-in [ ] Keepsake [ ] Sale [ ] Undecided [ ] Special review
Follow-up needed	_____ _____

18. Final Jewelry Location and Decision Record

Use this page to close the moving project and identify all remaining responsibilities.

Final Transition Summary

Jewelry moved with parent	_____
Jewelry placed in family storage	_____
Jewelry gifted to family	_____
Jewelry sold	_____
Jewelry still undecided	_____
Jewelry requiring special review	_____
Person maintaining records	_____
Next review date	_____

Resources and Private Appointment Information

Keep this page with the completed workbook for future reference.

Estate Jewelry Exchange USA

Private appointments are available for qualifying estate jewelry, older family jewelry, inherited jewelry, older watches, sterling silver jewelry, signed designer pieces, vintage costume jewelry, and mixed collections.

Helpful website pages

- Helping a Parent Sell an Older Jewelry Collection
- Office or Home Appointment for Selling Estate Jewelry
- What to Bring to an Estate Jewelry Appointment
- Schedule an Appointment

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Appointments: Monday-Sunday, 9:00 AM-6:00 PM

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Schedule a private appointment

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