


## Christina Baltz

PARTNER | NEW YORK

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### Christina is a partner in the private client and tax team.

She works with global families to develop and implement innovative and technically accurate planning strategies that address clients' wealth planning, corporate and family governance, charitable planning and family office needs and objectives, across generations and borders. More specifically, she has advised US and international individuals, family offices, business owners and charitable organizations on tax, estate planning, family and corporate governance, matrimonial and other legal issues, and has advised financial institutions on trust and compliance issues and estate planning products for private clients.

She has substantial experience in wealth management and structuring, having headed teams at UBS and JP Morgan, as well as working as a corporate and estate planning attorney at Cravath, Swaine & Moore and as a partner in the private client practice at Cadwalader, Wickersham & Taft. Her experience working at leading law firms and financial institutions has informed her wide-ranging perspective on clients' requirements and the most effective and practical ways in which to create and implement tailored solutions for them.

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### Talks

- *'Multi-Jurisdictional Family Offices and Private Investors,'* The US-Mexico Chamber of Commerce: Wealth Management Roundtable - October 17, 2024, speaker
- *'US Pre-Immigration Planning for Founders of Privately Held Businesses: Tricks, Tips & Traps to Avoid,'* STEP New York event - June 5, 2024, speaker

- ['Checklist 2020: Cross border estate planning in an election year.'](#) Withersworldwide webinar - October 14, 2020, co-presenter
- ['Withers talks: families and family office | Ep 5 - Asset protection for children including trusts and prenups.'](#) Withersworldwide podcast - September 24, 2020, speaker
- ['Succession Planning Through Co-Ownership.'](#) International Wealth Advisors Forum 2.0 (Tourettes, France) - May 16, 2019
- ['How Does US Tax Reform Impact investments Abroad? FATCA and CRS.'](#) ABA International Conference (Mexico City) - November 8, 2018
- ['Tax Reform and the Family Office.'](#) Withersworldwide New York - June 7, 2018
- ['Investment and Tax Strategies for Family Offices and Private Investors in an Age of International Uncertainty.'](#) Private Asset Management and EisnerAmper - June 14, 2017
- ['LatAm Trust Webinar.'](#) Amicorp Academy - May 24, 2017
- ['US Immigration for the Ultra High Net Worth Families: What's Hot, What's Not.'](#) Expert Webcast - May 2016
- ['Legal Parameters - Surviving in a Landscape of Heightened Regulation, Disclosure and Compliance.'](#) New York Business Group Global Private Wealth Forum, New York - April 12-13, 2016
- ['Trusts for Multinational Families: Navigating the Tangled Tax and Regulatory Compliance Web.'](#) Delaware Bankers Association 10th Annual Delaware Trust Conference, Wilmington - 26-27 October 2015
- ['Women in Wealth Management.'](#) Markets Group Private Wealth Latin America & The Caribbean Forum 2015, Miami - 20-22 October 2015
- ['Succession planning: how to fulfill the complex and differing needs of multi-generation family members, and Empowering your trustee: institutional trustees vs. family members and ensuring positive relationships.'](#) Terrapinn Private Banking Latin America & Americas Family Office Forum 2014, Miami - 19-20 November 2014
- ['Succession Planning: Sustaining Wealth through Generations in Latin America; Transitions are a difficult path for families -- how can the next generations overcome the traps of this process?.'](#) Latin Markets Private Wealth Latin America & The Caribbean Forum 2014, Miami - 23-24 October 2014
- ['Wealth Planning: Tax, Trust & Estate Structures - How do Private Wealth Management firms from across the region ensure that wealth is preserved for future generations?.'](#) Latin Markets Private Wealth Latin America & The Caribbean Forum 2013, Miami 24-25 - October 2013
- ['Growing Wealth in Latin America.'](#) Latin Markets Latin America Family Office Forum, São Paulo, 14-15 June 2012
- ['Delaware as a Jurisdiction For International Planning: Past, Present and Future.'](#) Delaware Bankers Association 5th Annual Delaware Trust Conference, Wilmington - November/December 2010
- ['Estate Planning for the Latin American HNWI: Mega-trends in global estate planning and taxes; Ensuring that wealth is passed effectively with minimal tax paid; Choosing the best people to manage your estate and ensure G2 and G3 members will continue the family legacy.'](#) Terrapinn Private Banking Latin America & Americas Family Office Forum 2010, Miami - 15-17 November 2010

## External publications

['The best US and East Coast tax and trust lawyers for high net worth individuals.'](#) Spears - September 29, 2021, featured

['LATAM - Latin American money: Moving locations, where and why.'](#) CityWealth - September 14, 2022, quoted

['Thinking about giving money to adult children? Think again.'](#) The New York Times - November 6, 2019, quoted

['Anderson Cooper's large inheritance: A look at the tax obligations.'](#) Fox Business - July 2, 2019, quoted

['4 tax strategies that could make a divorce settlement easier.'](#) The New York Times - April 19, 2019, quoted

['How the new federal and New York estate tax exemption could affect your estate plan.'](#) Withers article - January 2018, co-author

['The best women lawyers in New York City \(2018\).'](#) the Law - December 20, 2017, featured

## Admissions

State of New York, 1991

Registered Foreign Lawyer in the UK, 2016

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## Education

Barnard College, Columbia University, B.A.

Tulane Law School, magna cum laude, Order of the Coif, J.D.

Articles Editor Tulane Law Review

New York University, LL.M. (Taxation)

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## Languages

English

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## Memberships

Vice Chair of the International Private Client Committee of the American Bar Association International Law Section

Planned Giving Advisory Committee of The Museum of Modern Art in New York

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## Key dates

Year joined: 2016

Year became partner: 2016

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