


Christina Baltz

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Christina est associée dans l'équipe Private Client and Tax. Christina travaille pour des familles dans le monde entier afin de développer et de mettre ne oeuvre des stratégies innovantes et techniquement très précises de planification successorale et financière, de gestion familiale ou professionnelle, de planification de bienfaisance ou encore en terme de besoins et d'objectifs pour les family offices en dépassant les frontières et en travaillant avec plusieurs générations. Plus précisément, elle a conseillé des particuliers au niveau national et international, des family offices, des hommes d'affaires et des organisations de bienfaisances d'un point de vue fiscal, immobilier ou sur toute autre question juridique ou de gouvernance. A cela s'ajoute du conseil aux institutions financières sur les trusts et autres problématiques de conformité et sur la planification immobilière pour particuliers.

Elle possède en outre une expérience notable en gestion de fortune et structuration du patrimoine gagnée au cours des années passées à la tête des équipes de L'UBS et de JP Morgan, puis lorsqu'elle travailla comme avocate en planification institutionnelle et successorale chez Cravath, Swaine & Moore ou encore comme associée pour des clients privés chez Cadwalader, Wickersham & Taft. Tous ces acquis obtenus en travaillant et en dirigeant des études d'avocats ou des institutions financières lui ont permis d'être au fait des vastes attentes des clients et de leur proposer des solutions efficaces et adaptées.

Christina a été sélectionnée pour le Citywealth Power Women Awards 2016 et figure dans la Citywealth North America Wealth Advisors and Managers List, 2005.

Discussions

- 'Checklist 2020: Cross border estate planning in an election year,' Withersworldwide webinar - Octobre 14, 2020, co-presenter
- 'Withers talks: families and family office | Ep 5 - Asset protection for children including trusts and prenups,' Withersworldwide podcast - Septembre 24, 2020, conférencier
- 'Succession Planning Through Co-Ownership,' International Wealth Advisors Forum 2.0 (Tourettes, France) - Mai 16, 2019
- 'How Does US Tax Reform Impact investments Abroad? FATCA and CRS,' ABA International Conference (Mexico City) - Novembre 8, 2018
- 'Tax Reform and the Family Office,' Withersworldwide New York - Juin 7, 2018
- 'Investment and Tax Strategies for Family Offices and Private Investors in an Age of International Uncertainty,' Private Asset Management and EisnerAmper - Juin 14, 2017
- 'LatAm Trust Webinar,' Amicorp Academy - Mai 24, 2017
- 'US Immigration for the Ultra High Net Worth Families: What's Hot, What's Not,' Expert Webcast - Mai 2016
- 'Legal Parameters - Surviving in a Landscape of Heightened Regulation, Disclosure and Compliance,' New York Business Group Global Private Wealth Forum, New York - Avril 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 Octobre 2015
- 'Women in Wealth Management,' Markets Group Private Wealth Latin America & The Caribbean Forum 2015, Miami - 20-22 Octobre 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 Novembre 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 Octobre 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 - Octobre 2013
- 'Growing Wealth in Latin America,' Latin Markets Latin America Family Office Forum, São Paulo, 14-15 Juin 2012
- 'Delaware as a Jurisdiction For International Planning: Past, Present and Future,' Delaware Bankers Association 5th Annual Delaware Trust Conference, Wilmington - Novembre/Décembre 2010
- 'Estate Planning for the Latin American HNW: 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 Novembre 2010

Publications externes

'Investment and Tax Strategies for Family Offices and Private Investors in an Age of International Uncertainty,' Private Asset Management and EisnerAmper – 14 Juin 2017

'LatAm Trust Webinar,' Amicorp Academy - 24 Mai 2017

'US Immigration for the Ultra High Net Worth Families: What's Hot, What's Not,' Expert Webcast - Mai 2016

'Legal Parameters – Surviving in a Landscape of Heightened Regulation, Disclosure and Compliance,' New York Business Group Global Private Wealth Forum, New York – 12/13 Avril 2016

'Trusts for Multinational Families: Navigating the Tangled Tax and Regulatory Compliance Web,' Delaware Bankers Association 10th Annual Delaware Trust Conference, Wilmington - 26-27 Octobre 2015

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'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 Octobre 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 - Octobre 2013

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'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 Novembre 2010

Adhésions

State of New York, 1991

Registered Foreign Lawyer au Royaume-Uni, 2016

Études

Barnard College, Columbia University, B.A.

New York University, LL.M. (Taxation)

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

Articles Editor Tulane Law Review

Langues

Anglais

Espagnol

Français

Affiliations

Planned Giving Advisory Committee du Museum of Modern Art de New York

Key dates

Year joined: 2016

Year became partner: 2016

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