akerman

People

Adam von Poblitz

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Adam von Poblitz advises ultra-high-net-worth individuals, families, family offices, and charitable organizations in the United States and abroad on all aspects of domestic and cross-border estate planning. Adam helps clients design plans that secure their families' futures in keeping with their vision and values.

Adam focuses his practice on estate, gift, and generation-skipping transfer tax planning; income tax planning; cross-border and international estate planning for U.S.-connected clients; trust and estate administration; business succession planning; premarital planning; and philanthropic and charitable planning. Drawing on his formal training in fine and decorative arts, he also counsels collectors, fiduciaries, and institutions on the unique planning, succession, and tax considerations surrounding significant art collections. He spent nearly two decades at one of the world's largest global private banks, where he most recently served as global head of wealth advisory for its family office group, advising many of the world's most sophisticated families on the structures that govern their wealth across generations and jurisdictions.

During his tenure in private banking, Adam held a series of senior leadership roles — including global head of cross-border wealth planning and head of trust for North America — where he led the North American team responsible for designing sophisticated wealth plans for U.S. and international clients, oversaw wealth planning strategy for the bank's North American and global private banking businesses, and served on the bank's North America leadership team and global trust leadership team. Before moving in-house, he practiced trusts and estates law at prominent New York law firms, where his work encompassed sophisticated estate planning, estate administration, estate litigation, and art law.

A recognized authority on estate planning, Adam is a frequent speaker on wealth planning topics in the United States and internationally, and his insights have been featured in *The New York Times*, *The Wall Street Journal*, *Chicago Tribune*, *Barron's*, and *Bloomberg*.

Areas of Experience

Trusts and Estates
Probate and Fiduciary Litigation
Tax
International Tax
Tax-Exempt Organizations

Education

LL.M. in Taxation, New York University School of Law, 2007
J.D., Northwestern University Pritzker School of Law, 1999
M.Phil. (read), Oxford University, English Literature, 1995
B.A., Georgetown University, 1993

Admissions

Bars

Florida
New York

Courts

U.S. Tax Court

Related Professional Experience

- Citi Private Bank, Global Head of Wealth Advisory of the Global Family Office, 2020-2026; Global Head of Cross-Border Wealth Planning, 2018-2020; Head of Citi Trust North America, 2015-2018; Head of Estate Planning, 2007-2014

Additional Education

- Diploma, Christie's Education, Christie's Auction House, London, 1996

Published Work and Lectures

- Citi EMEA Family Office Executive Forum, Speaker, Managing Cross-border Families: Navigating the Sea of Options," November 6, 2024
- Citi 2024 Family Office Leadership Program, Moderator, "Managing Cross-border Families and Assets: Navigating a Sea of Options," June 5, 2024
- Citi EMEA Family Office Executive Programme, Moderator, "Global Mobility," November 8, 2023
- Citi 2023 Family Office Leadership Program, Moderator, "A Brave New World: Planning For the Modern Family," June 6, 2023
- Citi EMEA Family Office Executive Programme, Moderator, "International Regulatory Trends and What It Means to Family Offices," November 15, 2022
- Citi 2022 Family Office Leadership Program, Moderator, June 6-8, 2022
- Citi Private Capital Group Roundtable, Moderator, "When hope is Not a Strategy," March 24, 2021
- Citi EMEA Family Office Executive Programme, Speaker, "Thinking About the Future and Preparing for Wealth Transition," September 29, 2019
- Citi 2019 Family Office Leadership Program, Moderator, " Safeguarding Assets in a Changing World," June 4, 2019
- Citi 2018 Family Office Leadership Program: Asia Pacific Executive Form, Moderator, " Preparing the Family for a Trust Conversation — What Family Offices Can Do," October 26, 2018
- Citi Global Investment Outlook, Prague, "Planning FO US Situs Investments," October 2, 2018
- Citi 2018 Family Office Leadership Program, Moderator, " Legal Protections For Family Members — A Practical Approach to Prenups, Family Ownership, and Trusts," June 6, 2018
- *The New York Times*, Quoted, "How to Plan for the Unforeseen," October 6, 2017
- *Penta Asia*, Quoted, "Citi's Advice for Asia's Super-Rich," July 22, 2016
- *The Wall Street Journal*, Quoted, "Estate Planning Tool May Lose Allure," June 15, 2015
- Deloitte's 8th Annual Art & Finance Conference, Speaker, "Art Lending Cases," March 5, 2015
- *The New York Times*, Quoted, "Writing Off the Warhol Next Door," January 10, 2015
- *Barron's*, Quoted, "When Longevity Upends Trusts," November 29, 2014
- *The New York Times*, Quoted, "When a Will Divides an Estate, and Also Divides a Family," June 20, 2014

- *The Business Times*, Quoted, “Averting Disputes Over Inheritance,” June 24, 2014
- *The Wall Street Journal*, Quoted, “Dear Trustee: I Meant...,” June 13, 2014
- *The Wall Street Journal*, Quoted, “Tapping the Trusty Trust Fund to Buy a House,” September 19, 2013
- *The New York Time*s, Quoted, “Few Places to Hide as Taxes Trend Higher Worldwide,” December 2, 2012
- *The Wall Street Journal*, Quoted, “Preparing to Leave,” May 9, 2012
- *The New York Tim*es, Quoted, “A Year to Stay Flexible on Tax Plans,” February 8, 2012
- *The New York Times*, Quoted, “Take Advantage of Tax Breaks Now, Experts Say,” October 18, 2011
- *Bloomberg*, Quoted, “Dynasty Trusts: A Way to Let the Wealthy Duck Estate, Gift Taxes Forever?,” July 28, 2011
- *Barron’s*, Quoted, “The Five Biggest Ways to Bungle a Trust,” May 21, 2011
- *Chicago Tribune*, Quoted, “Give a Gift and Cut Your Taxes,” November 25, 2010
- Sioux Falls Estate Planning Council, Speaker, “Sales to Intentionally Defective Grantor Trusts,” October 21, 2010

Affiliations

- Society of Trust and Estate Practitioners (STEP), Member
- The Florida Bar
  - Real Property Probate and Trust Law Section, Member
- New York City Bar Association
  - Estate & Gift Tax Committee, Former Member
  - Trusts, Estates, and Surrogate’s Court Committee, Former Member
- Royal Society of Arts, Diplomate