

ROBERT A. MASON,
Certified Elder Law Attorney
Summary of Elder Law, Estate Planning and Health Law Experience

Elder Law: A specialized form of estate planning for the older or disabled individual, this practice area focuses on planning for unique issues involving incapacity, specialized testamentary desires and long term care financing alternatives (including Medicaid planning). Have extensive experience in special or supplemental needs trusts, advanced asset protection planning for guardians and wards, and life care planning. Particular interests include legal and ethical issues involving end-of-life health care decision making, including the law of advance health care directives. Am one of 9 certified elder law attorneys (as certified by the National Elder Law Foundation and as recognized by the State Bar of North Carolina) in North Carolina, and one of 6 in Georgia. Past Chair of Elder Law section of North Carolina Bar. Maintain offices in Asheboro, North Carolina and Savannah, Georgia.

Estate Planning/Family Business Counseling: Extensive experience in all aspects of complex estate planning for the high net worth individual as well as corporate and succession planning for family owned/closely held businesses. Specific experience includes implementation of a wide variety of wealth preservation, tax avoidance and asset protection strategies including family partnerships/LLCs, split-interest trusts, personal residence trusts, sales to defective grantor trusts, dynasty trusts, and gifting programs. Have counseled closely held businesses on a variety of succession planning and benefits issues involving buy-sell agreements, stock plans, Jumbo IRAs, ESOPs, split-dollar insurance arrangements and testamentary dispositions of business interests.

Health Law: Major engagements involving, among others, formation of behavioral health provider network to contract for state and federally funded mental health, mental retardation and substance abuse services. Extensive experience in formation of hospital/physician alliances; Medicare/Medicaid fraud and abuse analysis; certificate of need and other planning issues; formation of managed care entities and compliance with and planning for other legal aspects of a health care corporate practice such as antitrust, securities regulation, ERISA preemption, insurance regulation and corporate practice of medicine issues. General Counsel for largest long term care facility in State of Georgia.

EDUCATION

Walter F. George School of Law
Mercer University
Macon, Georgia
J.D. *cum laude* 1988

Activities/Honors: Upper 5% of class; Managing Editor, *Mercer Law Review*; Brainerd Currie Honor Society; Phi Kappa Phi National Honor Society; Who's Who in American Colleges and Universities; Corpus Juris Secundum Award for Outstanding Second Year Student; Georgia Bar Association Author's Court Award for best student authored law review article in state (*Good Samaritan Laws - Legal Disarray*, 38 *Mercer Law Review* 1439 (1988)); Dean's List every semester of law school.

Northwestern University
Evanston, Illinois
B.S. Communications 1975

LICENSURE/MEMBERSHIPS/BOARDS

- Licensed to practice law in North Carolina and Georgia.
- Certified Elder Law Attorney by the National Elder Law Foundation (recognized by the American Bar Association as the certifying entity for the legal specialization of Elder Law): One of nine in North Carolina
- Board Certified Specialist in Elder Law by the North Carolina State Bar Board of Legal Specialization
- Martindale-Hubbell peer review rated “av” rating (Per Martindale-Hubbell: “**AV® Peer Review Rating** — An AV rating is a significant accomplishment - a testament to the fact that a lawyer's peers rank him or her at the highest level of professional excellence. A lawyer must be admitted to the bar for 10 years or more to receive an AV rating.”)
- Past Chair of 12 lawyer governing Council of North Carolina Bar’s Elder Law Section.
- Listed in 2009 and 2010 North Carolina Super Lawyers magazine under Elder Law
- Served term on 12 lawyer governing Council of North Carolina Bar’s Estate Planning and Fiduciary Law Section.
- National Academy of Elder Law Attorneys
- Academy of Special Needs Planners
- Special Needs Alliance
- Chairman of the Board, Hospice of Randolph County, Inc.
- Board of Directors, Randolph County Senior Adults Association, Inc.
- Frequent lecturer at continuing education programs for attorneys and other professionals
- Monthly legal columnist for *Coastal Senior* magazine (Savannah-Hilton Head Island)

PERSONAL

- Native of Nebraska; lived in Georgia 25 years; North Carolina 10 years
- Married to Ann Haslam Mason; one son (Bobby, 7th grade at Our Lady of Grace Catholic School, Greensboro, NC)
- Our Lady of Grace Catholic Church, Greensboro, NC
- Enjoy hiking/backpacking, kayaking and reading