

ROBERT A. MASON, CELA, CAP
Certified Elder Law Attorney
Summary of Elder Law/Special Needs Law and Estate Planning

Elder Law/Special Needs 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). Extensive experience in special or supplemental needs trusts, advanced asset protection planning for guardians and wards, and life care planning. Recognized expert and frequent lecturer on grantor trusts, trust taxation, and use of trusts in Medicaid and VA benefit planning. Fellow, American Academy of Estate and Trust Counsel (ACTEC). Certified elder law attorney by the National Elder Law Foundation. Board Certified Specialist in Elder Law by the North Carolina Board of Legal Specialization. Owner of Mason Law, PC, Asheboro and Charlotte, North Carolina, and of TrustChimp, LLC, an educational resource for attorneys and financial professionals in the areas of trust law and trust taxation.

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.

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 (CELA) by the National Elder Law Foundation.
- Board Certified Specialist in Elder Law by the North Carolina Board of Legal Specialization.
- Fellow, American College of Trust and Estate Counsel (ACTEC).
- Council of Advanced Practitioners of the National Academy of Elder Law Attorneys (must be CELA and “av rated” for 10 years and invited; less than 100 members nationally).
- Martindale-Hubbell peer review rated “av” rating (Per Martindale-Hubbell website: “**AV Preeminent® Rating** — AV Preeminent® is a significant rating accomplishment - a testament to the fact that a lawyer's peers rank him or her at the highest level of professional excellence.”).
- Chair, Elder Law Section, North Carolina Bar Association (2013-2014; 2008-2009).
- Chair, Elder Law Section, Georgia State Bar (Current)
- Chair, North Carolina State Bar Board of Legal Specialization (Current).
- Listed in 2009, 2010, 2015, 2016, and 2017 North Carolina Super Lawyers magazine under Elder Law.
- Listed in 2015, 2016, and 2017 Best Lawyers® in America.
- Served term on 12 lawyer governing Council of North Carolina Bar’s Estate Planning and Fiduciary Law Section.
- National Academy of Elder Law Attorneys.
- Chairman of the Board, Hospice of Randolph County, Inc. (2005-2012).
- Board of Directors, Pennybyrn at Maryfield, a continuing care retirement community sponsored by the Sisters of the Poor Servants of the Mother of God.
- Frequent lecturer at continuing educations programs for attorneys and other professionals.
- Frequent author of technical elder law, trusts and tax articles.
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PERSONAL

- Native of Nebraska; lived in Georgia 25 years; North Carolina 18 years
- Married to Ann Haslam Mason; one son (Bobby, Attending Appalachian State University, Boone, NC)
- St. Paul the Apostle Catholic Church, Greensboro, NC
- Enjoy hiking/backpacking, kayaking and reading