



J. Aaron Bennett

Director

About

Aaron Bennett has a broad-based practice serving individuals, families, and business owners. He also represents corporate and individual fiduciaries in trust and estate administration matters. He especially focuses on **estate and wealth transfer planning, estate and trust administration**, and **closely held business planning**.

Aaron enjoys working with families to develop solutions to the multifaceted issues that arise in helping them achieve their goals and objectives in a tax efficient manner, whether in preparing estate planning instruments, facilitating charitable giving, administering estates, or modifying and restructuring irrevocable trusts.

In counseling clients, Aaron draws on his experience from working in the financial services field prior to law school, along with his educational background through earning a master's degree in business administration and a bachelor's degree with an emphasis on trust and wealth management. By blending that education and experience with his knowledge of the law, he provides skilled counsel on strategies appropriate to each client's unique circumstances.

Education

- Campbell University, B.B.A./M.B.A., Summa Cum Laude (2005)
- Elon University, J.D., Magna Cum Laude (2009)

Representative Cases

- Designed specialized estate plans for families – providing wealth succession over multiple generations and minimizing probate fees and estate taxes. In addition to wills, revocable trusts, and powers of attorney, a variety of sophisticated estate planning techniques were used, including dynasty trusts, irrevocable life insurance trusts (ILITs), qualified personal residence trusts (QPRTs), and grantor retained trusts (GRATs and GRITs).
- Modified an irrevocable trust agreement established in the 1990s to allow for greater administrative efficiencies and achieve more favorable tax outcomes.
- Provided counsel to the Executor of a decedent's estate regarding the tax efficient transfer of assets to the heirs while coordinating with financial institutions and navigating the probate process.

Contact

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Professional Memberships and Activities

- Greensboro Society of Financial Service Professionals, Past President
- Greensboro Estate Planning Council, Director
- Greensboro Bar Association
- North Carolina Bar Association, both Business Law and the Estate Planning and Fiduciary Law Sections
- American Bar Association

Awards and Recognitions

- Best Lawyers in America, 2018-2023
- North Carolina Super Lawyers: Rising Star, 2019-2022
- Elon Law Review, Business Editor

Bar and Court Admissions

- North Carolina, 2009

Practice Areas

Business

Employee Benefits

Estate Administration

Tax

Wills, Trusts & Estate Planning

Startups & Entrepreneurs

Related News

NEWS

Thirteen Carruthers & Roth Attorneys Named to 2023 Best Lawyers®; Two Attorneys Named to 2023 Best Lawyers: Ones to Watch in America

August 26, 2022

NEWS

Carruthers & Roth Attorneys Named to 2022 “Best Lawyers” and 2022 “Best Lawyers: Ones to Watch” Lists

August 19, 2021

NEWS

Fifteen Carruthers & Roth Attorneys Named to 2021 Best Lawyers® List; One Attorney Named to 2021 Best Lawyers: Ones to Watch

Greensboro, N.C. – Carruthers & Roth, P.A. announced today that 15 of the firm’s attorneys representing 23 practice areas have been named to the 2021 Edition of The Best Lawyers in America®, five of whom were selected as “Lawyer of the Year” in their respective practice areas in the Triad area. One additional attorney has been included in the inaugural edition of Best Lawyers: Ones to Watch.

August 21, 2020

Related Resources

RESOURCES

Trust and Estate Planning Strategies for Challenging Economic Times

December 07, 2022

RESOURCES

Tax Time Bombs: Defusing the Estate Tax Before the Exemption Sunsets and Navigating Inherited IRA Landmines

December 01, 2021

RESOURCES

Proposed Tax Reform Could Drastically Impact Estate & Gift Exemptions and Limit Common Estate Planning Strategies

September 23, 2021

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