

# Debt Roll-Forward

| (\$ in millions)                | Current | Incremental | At Split       | OpCo           | GLPI           |
|---------------------------------|---------|-------------|----------------|----------------|----------------|
| LTM EBITDA <sup>(1)</sup>       | \$783   |             |                |                |                |
| Leverage                        | 3.3x    |             |                |                |                |
| Long-term Debt 12/31/12         | \$2,731 |             |                |                |                |
| Cash E&P Dividend               |         | \$438       |                |                |                |
| Fortress Buyback                |         | \$412       |                |                |                |
| Other Preferred <sup>(2)</sup>  |         | \$253       |                |                |                |
| Transaction Expenses            |         | \$145       |                |                |                |
| 2013 FCF Per Guidance           |         | (\$505)     |                |                |                |
| 2013 Project CapEx Per Guidance |         | \$277       |                |                |                |
| Other                           |         | (\$31)      |                |                |                |
| <b>Pro-Forma Debt</b>           |         |             | <b>\$3,720</b> | <b>\$1,220</b> | <b>\$2,500</b> |
| <b>Pro-Forma EBITDA</b>         |         |             | <b>\$875.8</b> | <b>\$406.7</b> | <b>\$455.2</b> |
| <b>Pro-Forma Leverage</b>       |         |             | <b>4.2x</b>    | <b>3.0x</b>    | <b>5.5x</b>    |

(1) LTM 3/31/13 EBITDA excludes \$45.1M Maryland lobbying expense and \$6.4M Kansas legal accrual

(2) Includes \$22.5m Preferred Equity redeemed in the first quarter of 2013



# Rollforward Long Term Debt

**M Carnoy**



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## **Table of Contents Rollforward Long Term Debt**

1. Understanding the eBook Rollforward Long Term Debt
  - The Rise of Digital Reading Rollforward Long Term Debt
  - Advantages of eBooks Over Traditional Books
2. Identifying Rollforward Long Term Debt
  - Exploring Different Genres
  - Considering Fiction vs. Non-Fiction
  - Determining Your Reading Goals
3. Choosing the Right eBook Platform
  - Popular eBook Platforms
  - Features to Look for in an Rollforward Long Term Debt
  - User-Friendly Interface
4. Exploring eBook Recommendations from Rollforward Long Term Debt
  - Personalized Recommendations
  - Rollforward Long Term Debt User Reviews and Ratings
  - Rollforward Long Term Debt and Bestseller Lists
5. Accessing Rollforward Long Term Debt Free and Paid eBooks

- Rollforward Long Term Debt Public Domain eBooks
- Rollforward Long Term Debt eBook Subscription Services
- Rollforward Long Term Debt Budget-Friendly Options
- 6. Navigating Rollforward Long Term Debt eBook Formats
  - ePub, PDF, MOBI, and More
  - Rollforward Long Term Debt Compatibility with Devices
  - Rollforward Long Term Debt Enhanced eBook Features
- 7. Enhancing Your Reading Experience
  - Adjustable Fonts and Text Sizes of Rollforward Long Term Debt
  - Highlighting and Note-Taking Rollforward Long Term Debt
  - Interactive Elements Rollforward Long Term Debt
- 8. Staying Engaged with Rollforward Long Term Debt
  - Joining Online Reading Communities
  - Participating in Virtual Book Clubs
  - Following Authors and Publishers Rollforward Long Term Debt
- 9. Balancing eBooks and Physical Books Rollforward Long Term Debt
  - Benefits of a Digital Library
  - Creating a Diverse Reading Collection Rollforward Long Term Debt
- 10. Overcoming Reading Challenges
  - Dealing with Digital Eye Strain
  - Minimizing Distractions
  - Managing Screen Time
- 11. Cultivating a Reading Routine Rollforward Long Term Debt
  - Setting Reading Goals Rollforward Long Term Debt
  - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of Rollforward Long Term Debt
  - Fact-Checking eBook Content of Rollforward Long Term Debt
  - Distinguishing Credible Sources
- 13. Promoting Lifelong Learning
  - Utilizing eBooks for Skill Development

- Exploring Educational eBooks

#### 14. Embracing eBook Trends

- Integration of Multimedia Elements
- Interactive and Gamified eBooks

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