

# 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

**Wenbin Ji**

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