Debt Roll-Forward

GLPI	ОрСо	At Split	Incremental	Current	(\$ in millions)
				\$783	LTM EBITDA (I)
				3.3x	Leverage
				\$2,731	Long-term Debt 12/31/12
			\$438		Cash E&P Dividend
			\$412		Fortress Buyback
			\$253		Other Preferred (7)
			\$145		Transaction Expenses
			(\$505)		2013 FCF Per Guidance
			\$277		2013 Project CapEx Per Guidance
			(\$31)		Other
\$2,500	\$1,220	\$3,720			Pro-Forma Debt
\$455.2	\$406.7	\$875.8			Pro-Forma EBITDA
5.5x	3.0x	4.2x			Pro-Forma Leverage
					Pro-Forma E8ITDA Pro-Forma Leverage

⁽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

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