

Debt Roll-Forward

(\$ in millions)	Current	Incremental	At Split	OpCo	GLPI
LTM EBITDA ⁽¹⁾	\$805				
Leverage	3.4x				
Long-term Debt 12/31/12	\$2,731				
Cash E&P Dividend		\$294			
Fortress Buyback		\$411			
Other Preferred ⁽²⁾		\$253			
Transaction Expenses		\$140			
2013 FCF Per Guidance		(\$463)			
2013 Project CapEx Per Guidance		\$195			
Other		(\$44)			
Pro-Forma Debt			\$3,517	\$1,054	\$2,463
Pro-Forma EBITDA			\$805.1	\$351.4	\$439.8
Pro-Forma Leverage			4.4x	3.0x	5.6x

(1) LTM 6/30/13 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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