



# Debt & Capital Advisory

Deal Advisory

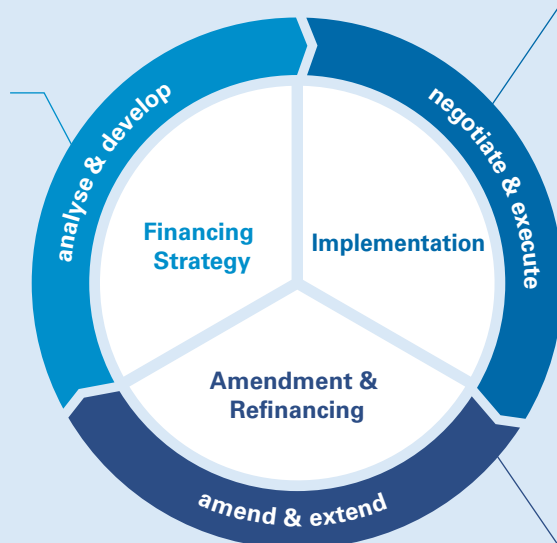
KPMG's Debt & Capital Advisory practice provides you with independent and objective advice regarding all aspects of your debt and capital needs. We leverage our comprehensive corporate banking experience and intimate capital market knowledge to optimize your financing strategy and implement it at the most advantageous terms. Our strong relationships to lenders and investors and our access to in-house experts in audit, tax, legal and transaction services ensures a seamless and multidisciplinary solution.

## Your challenges

- Optimise lending conditions
- Diversify funding base and financing partners
- Negotiate covenant waivers and execute financing amendments
- Refinance facilities at maturity
- Fund succession, acquisitions or large capex projects
- Develop and implement capital allocation strategy

## Our approach

1. Analyse financing requirements and objectives
2. Optimize balance sheet and calculate debt capacity
3. Explore funding options and diversify
4. Determine financing strategy and specify capital structure



1. Establish deal plan and timing
2. Prepare information package and specify term sheet
3. Perform competitive tender
4. Benchmark and negotiate financing offers
5. Complete and sign financing documents

1. Restructure distressed facilities and negotiate covenant waivers
2. Assist with reporting obligations
3. Facilitate amend & extend of maturing facilities

## Our Services

- Optimisation and implementation of financing structure (strategy, instruments, partners)
- Negotiation of covenant waivers and amendments
- Structuring of succession, LBO/MBO and acquisition financing as well as large capex projects
- Support of capital market issuances (bonds, Schuldscheine, private placements)
- Structuring of off-balance sheet financing (leasing)
- Development and implementation of capital allocation strategy

## Why KPMG?

<b>1</b>	<b>Independent and objective advice</b>	<ul style="list-style-type: none"><li>• No conflict of interest</li><li>• Optimisation of financing structure and terms</li><li>• Selection of ideal financing partners and products</li></ul>
<b>2</b>	<b>Support along the whole financing cycle</b>	<ul style="list-style-type: none"><li>• Advise from financing strategy over implementation to amendment and refinancing</li><li>• Leverage of management capacity</li></ul>
<b>3</b>	<b>Comprehensive corporate banking experience</b>	<ul style="list-style-type: none"><li>• Detailed knowledge of private and public debt capital markets</li><li>• Long experience of bank internal processes</li><li>• Strong relationships to lenders</li></ul>
<b>4</b>	<b>Establishing transparency</b>	<ul style="list-style-type: none"><li>• Creation of competitive environment among financing partners</li><li>• Transparency across products and counterparties</li><li>• Solid information basis for management decisions</li></ul>
<b>5</b>	<b>Multidisciplinary approach</b>	<ul style="list-style-type: none"><li>• Holistic approach</li><li>• Short-term access to experts from Audit, Legal, Tax and Advisory</li></ul>
<b>6</b>	<b>Local capability, global reach</b>	<ul style="list-style-type: none"><li>• KPMG Debt &amp; Capital Advisory is present in all leading finance centres providing local access to lenders and investors</li></ul>
<b>7</b>	<b>Fee payback</b>	<ul style="list-style-type: none"><li>• Added value exceeds fees over financing cycle</li><li>• Fixed, success- or time-based fee arrangements</li></ul>

## Contacts

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