

Deloitte.



Debt & Capital Advisory

Sustainable growth is based on an optimal financing structure

Professional support in financing matters

Deloitte Debt & Capital Advisory provides borrowers with independent advice and professional execution resources throughout the entire financing process. Our services range from strategic analysis of the optimal capital structure and existing financing alternatives to professional implementation of the financing strategy.

Financing decisions represent a material basis for the execution of the corporate strategy. Depending on the company's situation, these reach from refinancing for securing liquidity over raising additional facilities for capex or M&A to financial restructuring and renegotiations of financing terms. The currently dynamic market environment demands innovative financing solutions for changing business models and strategies.

Application cases



Borrowers



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Lenders

Deloitte provides support to companies in raising debt capital. Typical situations are characterized by:

- High flexibility requirement
- Complex financing structure
- High level of debt
- Multi-regional settings
- Event driven lending e.g. refinancing, growth / expansion, M&A processes, LBOs / MBOs or leveraged dividends, distressed lending or liquidity bridges.

Deloitte has profound contacts with local and international financing providers such as:

- banks
- family offices
- asset managers
- private debt funds
- investment banks
- asset-based lenders

and can also support them in the execution of refinancing or risk management.

Client groups

Borrowers

Private and listed companies

Support in the identification and implementation of financing products that lead to the optimal financing structure of the company.

Private Equity Funds

Professional execution resources with excellent contacts to Austrian banks, international financial institutions and private debt funds.

Customized services at the highest level

Deloitte has developed specific services to help our clients finding the optimal financing solution for their business activities.

Deloitte service portfolio



Financing concepts and option analysis

Analysis of the financial status and development of customized financing concepts for the implementation of strategic corporate goals.



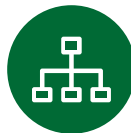
Refinancing and new financing

Support in refinancing existing (maturing) debt or raising new financing as part of a competitive bidding process between financing providers, as well as advice on the terms and conditions of various financing offers.



Analysis of term sheets and financing contracts

Review of existing offers from lenders and identifying potential for optimizing financing terms and conditions as well as support in negotiating of financing agreements.



Acquisition financing

Assisting companies and PE funds in structuring and raising acquisition financing (LBOs, MBOs, MBIs) with the involvement of additional financing providers.



Subordinated debt and alternative financing

Support in raising economic equity (profit participation rights, mezzanine, etc.), alternative financing (e.g. private debt), asset-based and off-balance sheet financing (e.g. sale and lease back, factoring) to improve equity structure and ratings.



Amend & Extend and Covenant Reset

Alignment and extension of existing financing, analysis of compliance or potential breaches of financial covenants under the current business plan and proactive communication with financing providers to adjust covenants.



Financial restructuring

Deloitte is a leading advisor in the financial restructuring of solid companies as well as companies in restructuring. We support in the moderation between stakeholders and creditor groups for a balanced restructuring concept.



C-Suite

Independent financial and capital market advisory services at board level.

Added value throughout the entire financing process

Why Deloitte?



Expertise

In-depth knowledge and understanding of the financing market and innovative financing solutions.



Global Network

Excellent long-standing contacts with decision makers in local and international banks as well as global network of private debt funds.



Independent advice

Professional advice, independent of financing partners and focused on your goals.



Execution resources

Experienced financing experts relieve your management capacities from extensive financing processes.



Competitive process management and negotiation expertise

Efficient, competitive financing process for best possible terms.



One stop shop

Integrated Debt & Capital Advisory and M&A teams as well as broad network and expertise (Financial Advisory, Tax, Legal) under one roof.

Global resources and implementation expertise

With our international team of over 200 finance professionals in more than 30 countries in Europe, North America, Africa and Asia, Deloitte is one of the leading Debt & Capital Advisory service providers globally.

This global presence enables a unique knowledge transfer and ensures that Deloitte can offer its clients the best possible advisory services, also in an international environment.

> 200 Debt & Capital experts in
> 30 countries

In the past 12 months, our global team has advised on over
130 transactions with a total funding volume of more than
EUR 10 Mrd.

Contact



Mag. Albert Hannak
Partner Financial Advisory

T: +43 1 537 00-2900
E: ahannak@deloitte.at



Mag. Bernhard Hudernik
Partner Financial Advisory

T: +43 1 537 00-2720
E: bhudernik@deloitte.at



Mag. Thomas Lahmer, CFA
Director Financial Advisory

T: +43 1 537 00-2722
E: tlahmer@deloitte.at

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