DEBT CAPITAL MARKETS
CORPORATE CLIENT INTAKE QUESTIONNAIRE:

CONFIDENTIAL DEAL INFORMATION. Please share material non-public information only after a non-disclosure agreement is in place, and confirm that no offers are being made before the offering documents and required disclosure are ready. Tender offers and consent solicitations run on fixed statutory timetables — tell us your launch date first.

CONFIDENTIAL. This questionnaire scopes a debt financing — the instrument, structure, offering format, disclosure, and closing requirements. It is for corporate, financial institution, sovereign, quasi-sovereign, and municipal issuers, and for underwriters, initial purchasers, dealer managers, and trustees. Estimates and ranges are fine at this stage. If a question does not apply, write "N/A."

NAME OF THE CLIENT:

[__] Legal Entity Name: ____________________

Entity type & jurisdiction: ____________________ Ticker (if public): __________

Client type:

- [__] Public company
- [__] Private company
- [__] Financial institution
- [__] Sovereign / quasi-sovereign
- [__] Municipal / public authority
- [__] Fund / SPV
- [__] Underwriter / initial purchaser
- [__] Dealer manager
- [__] Trustee / agent

Contact person & title: ____________________

Syndicate Plan Member ID: ____________________

Address: ____________________

City: ____________________ State: __________ Country: ___ Zip: _____

Phone: ____________________ Email: ____________________

Existing counsel / auditors: ____________________

PART 1 — TRANSACTION TYPE

1.1 Check all that apply:

- [__] Investment grade offering
- [__] High yield offering
- [__] Rule 144A offering
- [__] Regulation S offering
- [__] Private placement
- [__] Shelf registration statement / takedown
- [__] Commercial paper program
- [__] Structured notes
- [__] Capital trust securities
- [__] Subordinated debt offering
- [__] Project bonds
- [__] Municipal securities
- [__] Insurance-linked securities
- [__] Securitization *
- [__] Cash tender offer
- [__] Exchange offer
- [__] Consent solicitation
- [__] Sovereign / quasi-sovereign offering

** For securitizations, please also complete our Asset Securitization & Structured Finance Intake Form.*

1.2 Your role:

[__] Issuer
[__] Guarantor
[__] Underwriter / initial purchaser
[__] Dealer manager
[__] Placement agent
[__] Trustee / paying agent
[__] Investor

1.3 Describe the objective (new money, refinancing, liability management, regulatory capital, project funding): ______________________________

____

____

PART 2 — THE SECURITIES

2.1 Principal amount: $ ______________ Currency: ________ Tenor / maturity: ________

2.2 Coupon type & rate: ______________ Call / put features: ______________

2.3 Ranking & features:

[__] Senior unsecured
[__] Senior secured
[__] Subordinated
[__] Convertible / exchangeable
[__] Floating rate
[__] Zero coupon
[__] Green / sustainability-linked

2.4 Will the notes be guaranteed by subsidiaries or a parent? [__] Yes [__] No

2.5 Will the notes be secured? By what collateral? [__] Yes [__] No

If yes, explain: ______________________________

____

2.6 Expected ratings & agencies: ______________ Rating advisor: ______________

2.7 Will the securities be listed or admitted to trading anywhere? [__] Yes [__] No

Exchange / market: ______________________________

PART 3 — OFFERING FORMAT & TIMETABLE

3.1 Format:

[__] SEC-registered (new registration statement)
[__] Shelf takedown
[__] Rule 144A with Reg S tranche
[__] Reg S only
[__] Section 4(a)(2) private placement
[__] Municipal offering (official statement)
[__] Not yet determined

3.2 Target launch date: ______________ Pricing: __________ Closing: __________

3.3 Underwriters / initial purchasers / agents: ______________________________

3.4 Trustee / paying agent / calculation agent: ______________________________

3.5 Is a roadshow or investor marketing planned? [__] Yes [__] No

3.6 Are DTC eligibility and CUSIP / ISIN numbers arranged? [__] Yes [__] No

PART 4 — ISSUER FINANCIAL & DISCLOSURE READINESS

Item	Ready	In Progress	Not Started
Audited financial statements (required years)	[__]	[__]	[__]
Interim financial statements	[__]	[__]	[__]
MD&A / operating and financial review	[__]	[__]	[__]
Risk factors	[__]	[__]	[__]
Material contracts identified	[__]	[__]	[__]
Pro forma financials (if acquisitive)	[__]	[__]	[__]
Auditor comfort letter arranged	[__]	[__]	[__]
Legal opinions (validity, tax, 10b-5 disclosure)	[__]	[__]	[__]
Officer certificates & closing conditions	[__]	[__]	[__]

4.1 Auditor: ______________________________ Last audited fiscal year: __________

4.2 Is the issuer current in its public reporting obligations? [__] Yes [__] No

For reporting issuers with comment letters or delinquent filings, please also complete our Corporate Compliance & Public Reporting Intake Form.

4.3 Recent or pending material events requiring disclosure? [__] Yes [__] No

If yes, explain: ____

____

PART 5 — EXISTING DEBT & COVENANTS

Existing Facility / Notes	Lender / Trustee	Outstanding $	Maturity	Secured?

5.1 Do existing agreements restrict incurring new debt, liens, or guarantees? [__] Yes [__] No

5.2 Will consents, amendments, or waivers be required from existing lenders? [__] Yes [__] No

If yes, explain: ____

____

5.3 Are there cross-default or change-of-control provisions to consider? [__] Yes [__] No

5.4 Is an intercreditor or subordination agreement expected? [__] Yes [__] No

PART 6 — LIABILITY MANAGEMENT (TENDER, EXCHANGE, CONSENT)

6.1 Target securities (CUSIP / description): ______________________ Outstanding: $ ____________

6.2 Structure:

[__] Cash tender offer [__] Exchange offer

[__] Consent solicitation [__] Combined tender & consent

[__] Redemption / defeasance

6.3 Consideration offered: ____________________________ Early tender premium: ______________

6.4 Required consent threshold: ________________________ Expected participation: ______________

Tender offers must generally remain open for a minimum period, and amendments to core payment terms usually require the consent of each affected holder.

6.5 Are holders identifiable, or is the debt held in street name? [__] Yes [__] No

6.6 Information / tender agent: ____

PART 7 — SPECIAL PROGRAMS

7.1 Commercial Paper Program:

Program size: $ ______________________________ Dealers: ____________ Backstop facility: ____

7.2 Municipal / Public Authority:

Issuer & purpose: ______________________________________ Bank qualified? ________________

[__] Official statement [__] Continuing disclosure undertaking

[__] Bond counsel opinion [__] Tax-exempt status analysis

7.3 Bank Regulatory Capital (subordinated debt / capital trust securities):

Will the instrument be structured to qualify as regulatory capital? [__] Yes [__] No

7.4 Insurance-Linked & Structured Notes:

Underlying risk / reference asset: ____

Is a special purpose vehicle or reinsurance structure required? [__] Yes [__] No

PART 8 — CROSS-BORDER, DOCUMENTS & CERTIFICATION

8.1 Will the offering be made outside the United States? [__] Yes [__] No

Jurisdictions & local counsel: ____

8.2 Are withholding tax, FATCA, or currency control issues expected? [__] Yes [__] No

If yes, explain: ____

____

8.3 Is a non-disclosure agreement required before documents are shared? [__] Yes [__] No

Please provide the following, if applicable. Check each item available.

[__] Organizational documents
[__] Audited & interim financials
[__] Existing credit agreements & indentures
[__] Term sheet / mandate letter
[__] Rating agency presentations
[__] Draft offering memorandum or prospectus
[__] Board resolutions & authorizations
[__] Material contracts & litigation summary
[__] Prior offering documents
[__] Trustee / agent agreements

Certification:

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge, and that I am authorized to provide it on behalf of the entity named above. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating and scoping this transaction.

Signed and dated this ____ day of ______________________, 20___

Signature: ____

Print Name: ____________________________

Title: ____________________________

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Your information will be reviewed within one hour.