

IN THE UNITED STATES BANKRUPTCY COURT
FOR THE DISTRICT OF DELAWARE

-----X		
In re	:	Chapter 11
	:	
Rural/Metro Corporation, <u>et al.</u> ,	:	Case No. 13-11952 (KJC)
	:	
Debtors.	:	(Jointly Administered)
	:	
	:	
	:	
-----X		

**FIRST AMENDED JOINT CHAPTER 11 PLAN OF REORGANIZATION
FOR RURAL/METRO CORPORATION AND ITS AFFILIATED DEBTORS**

Dated: October 31, 2013

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INTRODUCTION

Rural/Metro Corporation and the other debtors and debtors-in-possession in the above-captioned cases listed on Exhibit A hereto, propose the following joint plan of reorganization for the resolution of the outstanding Claims¹ against and Interests in the Debtors. Reference is made to the Disclosure Statement for a discussion of the Debtors' history, business, properties and operations, projections for those operations, risk factors, a summary and analysis of this Plan, and certain related matters including, among other things, certain tax matters, and the securities and other consideration to be issued and/or distributed under this Plan. Subject to certain restrictions and requirements set forth in 11 U.S.C. § 1127 and Fed. R. Bankr. P. 3019, the Restructuring Support Agreement, and this Plan, the Debtors reserve the right to alter, amend, modify, revoke or withdraw this Plan prior to its substantial consummation.

Persons entitled to vote on this Plan are encouraged to read the Plan and the Disclosure Statement and their respective exhibits and schedules in their entirety before voting to accept or reject the Plan. No materials other than the Disclosure Statement and the respective schedules and exhibits attached thereto and referenced therein, and approved by the Bankruptcy Court have been authorized by the Bankruptcy Court for use in soliciting acceptances or rejections of the Plan.

ARTICLE I.

DEFINITIONS AND INTERPRETATION

A. *Definitions.*

The following terms shall have the meanings set forth below (such meanings to be equally applicable to both the singular and plural):

1.1. *ACE Companies* means, collectively, ACE American Insurance Company, Indemnity Insurance Company of North America, Illinois Union Insurance Company and Westchester Surplus Lines Insurance Company, and ESIS, Inc. and each of their respective affiliates.

1.2. *ACE Insurance Program* means all insurance policies and all agreements, documents or instruments relating thereto including, without limitation, any and all letters of credit and other collateral and security and claims servicing agreements, that have been issued or entered into by the ACE Companies (or any of them) to or with one or more of the Debtors and their respective predecessors and/or affiliates.

1.3. *Administrative Agents* means the Secured Credit Agreement Administrative Agent and the DIP Agent.

1.4. *Administrative Expense Claim* means any right to payment constituting a cost or expense of administration of the Reorganization Cases of the kind specified in section 503(b) of

¹ All capitalized terms used but not defined herein shall have the meanings set forth in Article I herein.

the Bankruptcy Code and entitled to priority pursuant to section 507(a)(2), 507(b) or 1114(e)(2) of the Bankruptcy Code (other than a Fee Claim) for the period from the Commencement Date to the Effective Date, including any actual and necessary costs and expenses of preserving the Estates, any actual and necessary costs and expenses of operating the Debtors' business, and any indebtedness or obligations incurred or assumed by the Debtors during the Reorganization Cases.

1.5. *Allowed* means, with reference to any Claim: (a) any Claim against any of the Debtors that has been listed by the Debtors on their schedules of assets and liabilities filed in the Reorganization Cases, as such schedules may be amended from time to time in accordance with Bankruptcy Rule 1009, as liquidated in amount and not disputed or contingent, and with respect to which no proof of claim has been filed; (b) any Claim that is not Disputed by the Claims Objection Deadline or other applicable deadline established in the Plan; (c) any Claim specifically Allowed pursuant to the terms of the Plan; (d) any Claim settled, compromised or otherwise deemed allowed by the Reorganized Debtors, in consultation with the Creditor Representative, in accordance with Article IX of this Plan; or (e) any Claim which, if Disputed, (i) has been determined by a Final Order of a court of competent jurisdiction, or (ii) has been allowed by Final Order of the Bankruptcy Court; provided, however, that any Claims allowed solely for the purpose of voting to accept or reject the Plan pursuant to an order of the Bankruptcy Court shall not be considered "Allowed Claims" hereunder.

1.6. *Amended and Restated Secured Credit Agreement* means the amended and restated Secured Credit Agreement, which will be annexed hereto as Exhibit B and filed as part of the Plan Supplement.

1.7. *Amended By-laws* means the amended by-laws for Reorganized RMC, which will be annexed hereto as Exhibit C and filed as part of the Plan Supplement.

1.8. *Amended Certificate* means the amended and restated certificate of incorporation for Reorganized RMC, which will be annexed hereto as Exhibit D and filed as part of the Plan Supplement.

1.9. *Assumed Executory Contracts and Unexpired Leases* means those contracts and leases listed on Schedule 10.3, which shall be filed by the Debtors at least twenty (20) days prior to the commencement of the Confirmation Hearing, as such schedule may be amended from time to time on or before the Confirmation Date.

1.10. *Avoidance Actions* means any and all avoidance, recovery and other actions under sections 502(d), 510, 542, 543, 544, 545, 547, 548, 549, 550, 551 and 553 of the Bankruptcy Code of the Debtors or their Estates; for the avoidance of doubt, Preference Actions are included within Avoidance Actions.

1.11. *Backstop Term Loan* means the "Backstop Term Loan" under the Amended and Restated Secured Credit Agreement to be used solely for the purpose of collateralizing the letters of credit issued under the Exit LC Facility and/or reimbursing draws made on any outstanding prepetition letters of credit made following the Commencement Date.

1.12. *Ballot* means the form distributed to holders of impaired Claims entitled to vote on the Plan on which is to be indicated the acceptance or rejection of the Plan.

1.13. *Bankruptcy Code* means title 11 of the United States Code, as amended from time to time, as applicable to the Reorganization Cases.

1.14. *Bankruptcy Court* means the United States Bankruptcy Court for the District of Delaware, or any other court exercising competent jurisdiction over the Reorganization Cases or any proceeding therein.

1.15. *Bankruptcy Rules* means the Federal Rules of Bankruptcy Procedure, as promulgated by the United States Supreme Court under section 2075 of title 28 of the United States Code, as amended from time to time, applicable to the Reorganization Cases, and any Local Rules of the Bankruptcy Court.

1.16. *Bar Date* means any deadline for filing proofs of Claim, as established by an order of the Bankruptcy Court or the Plan, as applicable.

1.17. *Business Causes of Action* means any and all of the Debtors' or their Estates' Causes of Action (other than Avoidance Actions) arising in the ordinary course of business or relating to any contract to which any Debtor is a party (against the contract counterparty that is not a Released Debtor Party), including any purchase agreement, acquisition agreement or merger agreement, but in no event shall a Business Cause of Action include any Claim or Cause of Action that is released pursuant to Sections 12.8 or 12.9 of the Plan. For the avoidance of doubt, Estate Accounting-Related Causes of Action and Litigation Trust Claims are excluded from Business Causes of Action.

1.18. *Business Day* means any day other than a Saturday, Sunday, or a "legal holiday," as defined in Bankruptcy Rule 9006(a).

1.19. *Cash* means the legal currency of the United States and equivalents thereof.

1.20. *Causes of Action* means any claims, causes of action, demands, rights, actions, suits, obligations, liabilities, accounts, defenses, offsets, powers, privileges, licenses, and franchises of any kind or character whatsoever, known, unknown, contingent or non-contingent, matured or unmatured, suspected or unsuspected, in contract or in tort, in law or in equity, or pursuant to any other theory of law. Without limiting the foregoing, Causes of Action also include: (a) all rights of setoff, counterclaim, or recoupment and claims on contracts or for breaches of duties imposed by law; (b) the right to object to or otherwise contest Claims or Interests; (c) claims pursuant to sections 362, 502(d), 510, 542, 543, 544 through 550, or 553 of the Bankruptcy Code (including Avoidance Actions); and (d) such claims and defenses as fraud, mistake, duress, and usury and any other defenses set forth in section 558 of the Bankruptcy Code.

1.21. *Claim* means a claim against a Debtor, whether or not asserted, known or unknown, as such term is defined in section 101(5) of the Bankruptcy Code, including: (a) any right to payment, whether or not such right is reduced to judgment, liquidated, unliquidated, fixed, contingent, matured, unmatured, disputed, undisputed, legal, equitable, secured, or unsecured; or (b) any right to an equitable remedy for breach of performance if such breach gives rise to a right to payment, whether or not such right to an equitable remedy is reduced to judgment, fixed, contingent, matured, unmatured, disputed, undisputed, secured or unsecured.

1.22. *Claims Agent* means Donlin, Recano & Company, Inc., or any other entity approved by the Bankruptcy Court to act as the Debtors' claims and noticing agent pursuant to 28 U.S.C. §156(c).

1.23. *Claims Objection Deadline* means the first Business Day that is sixty (60) days after the Effective Date, or such other later date the Bankruptcy Court may establish upon a motion by the Reorganized Debtors, after consultation with the Creditor Representative, which motion may be filed before or on such deadline and may be approved without a hearing and without notice to any Person.

1.24. *Class* means a category of Claims or Interests pursuant to section 1123(a)(1) of the Bankruptcy Code, and as set forth in Article IV of this Plan.

1.25. *Collateral* means any property or interest in property of the Debtors subject to a valid and unavoidable Lien to secure the payment or performance of a Claim.

1.26. *Commencement Date* means August 4, 2013.

1.27. *Committee Member Expense Claims* means the Claims for reasonable, actual attorneys' fees and expenses incurred by Henry Schein, Inc.'s outside counsel (in connection with these Reorganization Cases) from the Commencement Date through the Effective Date not to exceed \$100,000, plus the Creditors' Committee's members' (other than the Notes Trustee's) own reasonable, actual fees and expenses incurred from the Commencement Date through the Effective Date (excluding fees and expenses of counsel and other advisors).

1.28. *Committee Plan Issues* means those issues that (i) disproportionately impact the treatment, rights of, or distributions to (including the timing or amount thereof), Noteholders who are not Consenting Noteholders relative to the treatment of the Consenting Noteholders; (ii) impact the treatment, rights of, or distributions to (including the timing or amount thereof), Other Unsecured Claims, or affect provisions of the Plan addressing matters relevant to holders of Other Unsecured Claims, including, without limitation, with respect to Other Unsecured Cash, the Litigation Trust, the Litigation Trust Agreement, the Litigation Trust Assets, the Litigation Trust Beneficiaries, the Litigation Trust Claims, the Litigation Trust Interests, the Litigation Trust Trustee, the Cooperation Agreement, the Estate Accounting-Related Causes of Action, the Claims resolution process, Debtor Indemnification Claims, the Creditor Representative, the Creditor Representative Assets, the Creditor Representative Fund and the Creditor Representative Plan Supplement); or (iii) impact provisions of the Plan with respect to matters affecting the Creditors' Committee or its members (solely in their capacity as members of the Creditors' Committee but not in their capacity as individual creditors), including, as to the Creditors' Committee and its members, their current affiliates, successors, assigns, subsidiaries, officers, directors, principals, members, employees, agents, financial advisors, attorneys, accountants, investment bankers, consultants, representatives, equity holders, partners and other professionals, including, without limitation, with respect to Committee Member Expense Claims, any exculpations, releases or injunctions, Fee Claims, the Fee Claim Reserve Account, the Fee Claim Reserve Amount, and Potential Action Notices.

1.29. Confirmation Date means the date on which the Clerk of the Bankruptcy Court enters the Confirmation Order on the docket.

1.30. Confirmation Hearing means a hearing to be held by the Bankruptcy Court regarding confirmation of this Plan, as such hearing may be adjourned or continued from time to time.

1.31. Confirmation Order means the order of the Bankruptcy Court confirming this Plan pursuant to section 1129 of the Bankruptcy Code.

1.32. Consenting Lenders means, as of the relevant time, those holders of Secured Lender Claims that are party to the Restructuring Support Agreement.

1.33. Consenting Noteholders means, as of the relevant time, those holders of Noteholder Claims that are party to the Restructuring Support Agreement.

1.34. Converted Term Loan Obligations means those certain obligations of the Reorganized Debtors with respect to the Converted Term Loans under the Amended and Restated Secured Credit Agreement.

1.35. Converted Term Loans means those certain “Converted Term Loans” as defined in the Amended and Restated Secured Credit Agreement.

1.36. Cooperation Agreement means the agreement for purposes of cooperation and information-sharing between the Reorganized Debtors and the Litigation Trust, in form and substance reasonably satisfactory to the Debtors and the Creditors’ Committee, which will be annexed hereto as Exhibit Q and filed as part of the Plan Supplement.

1.37. Creditors’ Committee means the statutory committee of unsecured creditors appointed by the U.S. Trustee in the Reorganization Cases pursuant to section 1102 of the Bankruptcy Code on August 14, 2013, as entered on the Bankruptcy Court’s docket on August 15, 2013, as the same may be reconstituted from time to time.

1.38. Creditor Representative means, collectively, the three Persons appointed by the Creditors’ Committee, which appointment shall be reasonably acceptable to the Debtors and the Required Consenting Noteholders (which consent shall not be unreasonably withheld or delayed) who, among other things, will oversee the Claims resolution process in accordance with Article IX of this Plan and the Creditor Representative Assets. It is contemplated that Henry Schein, Inc. (or its designee) shall have a prominent role with respect to Claims resolution matters (this is not intended to be to the exclusion of the two other Persons comprising the Creditor Representative). The Creditor Representative may comprise the same individuals as the Litigation Trustee.

1.39. Creditor Representative Assets means \$250,000, which will be used to pay for the reasonable, actual fees, costs and expenses of (i) the prosecution of the Litigation Trust Claims, (ii) participation in the Claims resolution process, and (iii) the costs of administering the Litigation Trust.

1.40. *Creditor Representative Fund* means the fund to be created on the Effective Date in accordance with Section 7.17 of the Plan.

1.41. *Creditor Representative Plan Supplement* means the supplement, in form and substance reasonably satisfactory to the Debtors, the Required Consenting Noteholders and the Creditors' Committee, which will be annexed hereto as Exhibit N and filed as part of the Plan Supplement.

1.42. *Cure Amounts* means the relevant cure amount listed on Schedule 10.3 for each of the Assumed Executory Contracts and Unexpired Leases.

1.43. *Cure Dispute* has the meaning set forth in Section 10.3 of this Plan.

1.44. *Cure Notice* has the meaning set forth in Section 10.3 of this Plan.

1.45. *Cure Objection* has the meaning set forth in Section 10.3 of this Plan.

1.46. *Cure Objection Deadline* has the meaning set forth in Section 10.3 of this Plan.

1.47. *Cure Schedule* has the meaning set forth in Section 10.3 of this Plan.

1.48. *Debtor Indemnification Claim* has the meaning set forth in Section 12.4 of this Plan.

1.49. *Debtors* means Rural/Metro Corporation and each of its affiliated debtors and debtors in possession in the Reorganization Cases listed on Exhibit A hereto.

1.50. *Depository Trust Company Participants* means those holders of Allowed Noteholder Claims that are participants with the Depository Trust Company as of the relevant date of distribution of any Plan Consideration to such holders.

1.51. *DIP Agent* means Credit Suisse AG, Cayman Islands Branch, in its capacity as administrative agent under the DIP Credit Agreement.

1.52. *DIP Claim* means a Claim of a DIP Lender in respect of the obligations of the Debtors arising under the DIP Credit Agreement, including, without limitation, any unpaid principal, interest, fees, costs and expenses.

1.53. *DIP Credit Agreement* means the Senior Secured Super Priority Debtor in Possession Credit Agreement dated as of August 4, 2013, among Holdings, Rural/Metro Corporation, the lenders party thereto and the DIP Agent, as may be amended.

1.54. *DIP Lenders* means collectively and as of the relevant time, those lenders that are party to the DIP Credit Agreement and the DIP Agent.

1.55. *DIP Order* means that certain order or orders of the Bankruptcy Court authorizing and approving the DIP Credit Agreement, and approving the Debtors' use of Cash claimed as Collateral.

1.56. *Disallowed* means, with reference to any Claim, a finding of the Bankruptcy Court in a Final Order, or a provision in the Plan, providing that a Claim shall not be Allowed.

1.57. *Disbursing Agent* means any entity designated as such by the Plan, the Debtors (with the consent of the Required Consenting Noteholders and the Creditors' Committee, not to be unreasonably withheld, conditioned or delayed) or Reorganized Debtors.

1.58. *Disclosure Statement* means the disclosure statement that relates to this Plan, as such disclosure statement may be amended, modified, or supplemented (including all exhibits and schedules annexed thereto or referred to therein).

1.59. *Disclosure Statement Order* means that certain Order (A) Approving the Disclosure Statement, (B) Establishing the Voting Record Date, Voting Deadline, and Other Dates, (C) Approving Procedures for Soliciting, Receiving and Tabulating Votes on the Plan and for Filing Objections to the Plan and (D) Approving the Manner and Forms of Notice and Other Related Documents, entered by the Bankruptcy Court on November 5, 2013 [Docket No. 597], as the order may be amended from time to time.

1.60. *Disputed* means, with reference to any Claim, any claim that is not Allowed or Disallowed as of the relevant date.

1.61. *Disputed Claims Reserve* has the meaning set forth in Section 9.2 of this Plan.

1.62. *Distribution Address* means the address set forth in the relevant proof of claim. If no proof of claim is filed in respect to a particular Claim, then the address set forth in the Debtors' books and records or register maintained for registered securities.

1.63. *Distribution Record Date* means such date as shall be established by the Bankruptcy Court in the Confirmation Order.

1.64. *Effective Date* means the first Business Day on which all conditions to the Effective Date set forth in Section 11.2 of this Plan have been satisfied or waived.

1.65. *Employment Claim* has the meaning set forth in Section 8.16 of this Plan.

1.66. *ERISA* means the Employee Retirement Income Security Act of 1974, 29 U.S.C. §§ 1001-1461, as amended, (2006 & Supp. IV 2011), and the regulations promulgated thereunder.

1.67. *Estate* means each estate created in the Reorganization Cases pursuant to section 541 of the Bankruptcy Code.

1.68. *Estate Accounting-Related Causes of Action* means any of the Debtors' or their Estates' Causes of Action against Unreleased Debtor Parties relating to accounting/revenue recognition related matters, but in no event shall an Estate Accounting-Related Cause of Action include any Claim or Cause of Action that is released pursuant to Sections 12.8 or 12.9 of the Plan or Causes of Action that may be brought by individual Noteholders, the Notes Trustee,

individual Unsecured Creditors, the Secured Credit Agreement Administrative Agent or individual Secured Lenders on their respective own behalves.

1.69. *Estimation Order* means an order or orders of the Bankruptcy Court estimating for voting and/or distribution purposes (under section 502(c) of the Bankruptcy Code) the allowed amount of any Claim. The defined term Estimation Order includes the Confirmation Order if the Confirmation Order grants the same relief that would have been granted in a separate Estimation Order.

1.70. *Exculpated Parties* means each of, and solely in its capacity as such, (a) the Debtors and their current officers, Released Directors, principals, members, employees, agents, financial advisors, attorneys, accountants, investment bankers, consultants, representatives, equity holders, partners and other professionals, (b) the Creditors' Committee and its members (solely in their capacity as members of the Creditors' Committee but not in their capacity as individual creditors), (c) the Administrative Agents, (d) the DIP Lenders, (e) the Secured Lenders, (f) the Consenting Noteholders, (g) the Exit Preferred Holders, (h) the Disbursing Agent, (i) the Notes Trustee, and (j) with respect to each of the foregoing entities in clauses (b) through (i), such entity's current affiliates, successors, assigns, subsidiaries, officers, directors, principals, members, employees, agents, financial advisors, attorneys, accountants, investment bankers, consultants, representatives, equity holders, partners and other professionals.

1.71. *Existing Common Stock* means the common stock of Holdings, including both outstanding and treasury common stock.

1.72. *Existing Common Stock Interest* means, either (a) a share of Existing Common Stock, or (b) an Other Existing Interest.

1.73. *Existing Securities Laws Claim* means any Claim, whether or not the subject of an existing lawsuit, (a) arising from rescission of a purchase or sale of any securities of any Debtor or an affiliate of any Debtor, (b) for damages arising from the purchase or sale of any such equity security, (c) for violations of the securities laws, misrepresentations, or any similar Claims, including, to the extent related to the foregoing or otherwise subject to subordination under section 510(b) of the Bankruptcy Code, any attorneys' fees, other charges, or costs incurred on account of the foregoing Claims, or (d) except as otherwise provided for in this Plan, including Section 12.4 of this Plan, for reimbursement, contribution, or indemnification allowed under section 502 of the Bankruptcy Code on account of any such Claim, including (i) any prepetition indemnification, reimbursement or contribution obligations of the Debtors, pursuant to the Debtors' corporate charters, by-laws, agreements entered into any time prior to the Commencement Date, or otherwise, and relating to Claims otherwise included in the foregoing clauses (a) through (c), held by any officer or director of the Debtor not holding such position as of the Commencement Date, and (ii) Claims based upon allegations that the Debtors made false and misleading statements or engaged in other deceptive acts in connection with the sale of securities, or otherwise subject to section 510(b) of the Bankruptcy Code.

1.74. *Existing Term Loan Obligations* means those certain obligations of the Reorganized Debtors with respect to the Existing Term Loans under the Amended and Restated Secured Credit Agreement.

1.75. *Existing Term Loans* means those certain “Existing Term Loans” as defined in the Amended and Restated Secured Credit Agreement.

1.76. *Exit Issuance Backstop Fee* means 1% of the amount of the Rights Offering Amount paid in kind in additional shares of New Preferred Stock.

1.77. *Exit Issuance Deposit* means the \$10,000,000 deposited into an escrow account within five (5) Business Days after the Commencement Date by RM Funding Escrow LLC on behalf of certain of the Consenting Noteholders that are members of RM Funding Escrow LLC.

1.78. *Exit Issuance Deposit Fee* means 1% of the amount of the Exit Issuance Deposit paid in kind in additional shares of New Preferred Stock.

1.79. *Exit LC Facility* means the letter of credit facility among the Reorganized Debtors and the Secured Credit Agreement Administrative Agent, which will be annexed hereto as Exhibit E and filed as part of the Plan Supplement.

1.80. *February 3 Indenture* means that certain Indenture dated as of February 3, 2012 among Rural/Metro Corporation, the Guarantors named (and as defined) on the signature pages thereto and Wells Fargo Bank, National Association as Trustee (as may have been supplemented, amended and/or modified). Wilmington Trust, National Association, has succeeded Wells Fargo Bank, National Association, as Trustee.

1.81. *Fee Auditor* means Warren H. Smith & Associates, P.C.

1.82. *Fee Auditor Order* means the *Order Appointing Fee Auditor and Establishing Related Procedures Concerning the Payment of Compensation and Reimbursement of Expenses of Professionals and Members of Official Committees and Consideration of Fee Applications* dated August 28, 2013 [Docket No. 193].

1.83. *Fee Claim* means a Claim by a Professional Person for compensation, indemnification or reimbursement of expenses pursuant to sections 327, 328, 330, 331, 363, 503(b) or 1103(a) of the Bankruptcy Code in connection with the Reorganization Cases; provided, however, for the avoidance of doubt, the Fee Claims shall not include the claims of the Consenting Lenders Professionals or the Consenting Noteholders Professionals (each as defined in, and which shall be paid in accordance with, the Restructuring Support Agreement and the DIP Order, as applicable).

1.84. *Fee Claim Reserve Account* means the Cash reserve equal to the Fee Claim Reserve Amount established and maintained by the Debtors or the Reorganized Debtors in an account to pay any unpaid Allowed Fee Claims after the Effective Date.

1.85. *Fee Claim Reserve Amount* means the amount of (i) the aggregate Fee Claims incurred but unpaid through the Effective Date that have been included in a monthly fee statement or interim fee application submitted by a Professional Person and (ii) the aggregate Fee Claims that may accrue prior to the Effective Date that have not been included in a monthly fee statement or interim fee application submitted by a Professional Person as estimated in accordance with Section 3.3 of this Plan.

1.86. *Final Order* means an order or judgment of the Bankruptcy Court (or any other court of competent jurisdiction) entered by the Clerk of the Bankruptcy Court (or such other court) on the docket in the Reorganization Cases (or the docket of such other court), which has not been modified, amended, reversed, vacated or stayed and as to which (a) the time to appeal, petition for certiorari, or move for a new trial, stay, reargument or rehearing has expired and as to which no appeal, petition for certiorari or motion for new trial, stay, reargument or rehearing shall then be pending or (b) if an appeal, writ of certiorari, new trial, stay, reargument or rehearing thereof has been sought, such order or judgment of the Bankruptcy Court (or other court of competent jurisdiction) shall have been affirmed by the highest court to which such order was appealed, or certiorari shall have been denied, or a new trial, stay, reargument or rehearing shall have been denied or resulted in no modification of such order, and the time to take any further appeal, petition for certiorari or move for a new trial, stay, reargument or rehearing shall have expired, as a result of which such order shall have become final in accordance with Rule 8002 of the Federal Rules of Bankruptcy Procedure or any analogous rules under the Federal Rules of Appellate Procedure; provided, however, that the possibility that a motion under Rule 50 or 60 of the Federal Rules of Civil Procedure, or any analogous rule under the Bankruptcy Rules, may be filed relating to such order or judgment, shall not cause an order or judgment not to be a Final Order.

1.87. *Holdings* means WP Rocket Holdings Inc.

1.88. *Indentures* means the June 30 Indenture and the February 3 Indenture.

1.89. *Intercompany Claim* means any Claim (including an Administrative Expense Claim), cause of action, or remedy asserted by a Debtor against another Debtor.

1.90. *Intercompany Interests* means any Interest held by a Debtor in another Debtor.

1.91. *Interest* means the interest of any holder of an equity security in any Debtor, whether or not represented by any issued and outstanding share of Existing Common Stock, or other instrument evidencing a present ownership interest in any Debtor, whether or not transferable, or any option, warrant, or right, contractual or otherwise, to acquire any such interest, including Existing Common Stock.

1.92. *June 30 Indenture* means that certain Indenture dated as of June 30, 2011 among WP Rocket Merger Sub Inc., Rural/Metro Corporation, the Guarantors named (and as defined) on the signature pages thereto and Wells Fargo Bank, National Association as Trustee (as may have been supplemented, amended and/or modified). Wilmington Trust, National Association, has succeeded Wells Fargo Bank, National Association, as Trustee.

1.93. *Lien* has the meaning set forth in section 101(37) of the Bankruptcy Code.

1.94. *Litigation Trust* means the trust to be created on the Effective Date in accordance with Section 7.16 of the Plan and the Litigation Trust Agreement for the benefit of the Litigation Trust Beneficiaries.

1.95. *Litigation Trust Agreement* means the trust agreement, in form and substance reasonably satisfactory to the Debtors, the Required Consenting Noteholders and the Creditors' Committee, which will be annexed hereto as Exhibit M and filed as part of the Plan Supplement.

1.96. *Litigation Trust Assets* means the Litigation Trust Claims.

1.97. *Litigation Trust Beneficiaries* means holders of Allowed Noteholder Claims and Allowed Other Unsecured Claims.

1.98. *Litigation Trust Claims* means, collectively, (a) any of the Debtors' or their Estates' Causes of Action against Unreleased Debtor Parties to the extent not encompassed within the Estate Accounting-Related Causes of Action or Business Causes of Action and (b) Avoidance Actions, in each case, that the Creditors' Committee determines, in its sole discretion, will be assigned to the Litigation Trust, but in no event shall a Litigation Trust Claim include any Claim or Cause of Action that is released pursuant to Sections 12.8 or 12.9 of the Plan or Causes of Action that may be brought by individual Noteholders, the Notes Trustee, individual unsecured creditors, the Secured Credit Agreement Administrative Agent or individual Secured Lenders on their respective own behalves. Notwithstanding anything to the contrary, any Preference Actions against Persons that are not "insiders" of the Debtors (as defined in the Bankruptcy Code) shall be waived as of the Effective Date and shall not be pursued by the Litigation Trust or any other party. For the avoidance of doubt, the Creditors' Committee or the Litigation Trustee (as applicable) shall determine, in its sole discretion, whether Avoidance Actions (including Preference Actions) or any other Litigation Trust Claims against "insiders" of the Debtors shall be pursued or waived (to the extent not released pursuant to Sections 12.8 or 12.9 of this Plan).

1.99. *Litigation Trust Interests* means the beneficial interests in the Litigation Trust to be deemed distributed to the Litigation Trust Beneficiaries and the right to receive distributions on account of such beneficial interests.

1.100. *Litigation Trustee* means, collectively, the three Persons identified as such in the Litigation Trust Agreement to administer the Litigation Trust in accordance with the terms and provisions of Section 7.16 of the Plan and the Litigation Trust Agreement. The Creditors' Committee, in its sole discretion, shall appoint the Litigation Trustee to oversee the Litigation Trust, which appointment shall be reasonably acceptable to the Debtors and the Required Consenting Noteholders (which consent shall not be unreasonably withheld or delayed). The Litigation Trustee may comprise the same individuals as the Creditor Representative.

1.101. *Management Agreements* means, collectively, those agreements that will be entered into by Reorganized RMC and certain of the Reorganized Debtors, on the one hand, and certain officers of the Reorganized Debtors, on the other hand.

1.102. *Management Equity Plan* means the management incentive plan that will be established for certain members of management of the Reorganized Debtors.

1.103. *Monthly Distribution Date* means the last Business Day of the month following the end of each calendar month after the Effective Date; provided, however, that: (a) if the Effective Date is within thirty (30) days of the end of a calendar month, then the first Monthly

Distribution Date will be the last Business Day of the month following the end of the first calendar month after the calendar month in which the Effective Date falls; or (b) if the amount of Plan Distributions to be made on such date are less than \$100,000 in the aggregate and the Disbursing Agent determines, in his sole discretion, that there are not sufficient Plan Distributions to be made on such date, then the Monthly Distribution Date will be on the last Business Day of the month following the end of the next calendar month.

1.104. *New Common Stock* means, collectively, 1,200,000 shares of common stock of Reorganized RMC, par value \$0.01, to be authorized for issuance by Reorganized RMC in connection with the implementation of, and as authorized by, this Plan.

1.105. *New Preferred Stock* means, collectively, 500,000,000 authorized, and 136,450,000 initially issued, shares of 15% redeemable preferred stock of Reorganized RMC, with a liquidation preference of \$1.00 per share, to be issued by Reorganized RMC in connection with the implementation of, and as authorized by, this Plan, as more fully described in the Certificate of Designations which will be annexed hereto as Exhibit F.

1.106. *Nominee* means the applicable broker, bank, commercial bank, transfer agent, trust company, dealer or other agent or nominee that holds Noteholder Claims for the benefit of one or more beneficial owners for whom such Nominee acts.

1.107. *Notes* means the 10.125% Senior Notes due 2019 issued under the Indentures.

1.108. *Notes Trustee* means Wilmington Trust, National Association, or any successor trustee appointed in accordance with the terms of the Indentures.

1.109. *Notes Trustee Fee Claims* means the Claims for reasonable, actual fees and expenses, including reasonable, actual attorneys' fees and expenses, incurred by the Notes Trustee from the Commencement Date through the Effective Date.

1.110. *Noteholders* means, collectively and as of the relevant time, holders of Notes solely in their capacity as such.

1.111. *Noteholder Claim* means Claims arising under the Notes issued under the Indentures.

1.112. *Other Existing Interest* means any Interest in Holdings other than Existing Common Stock, including, but not limited to, any warrants, options, or rights to receive or purchase shares of Existing Common Stock and any preferred shares authorized to be issued by Holdings.

1.113. *Other Secured Claim* means any Secured Claim against a Debtor other than a Secured Lender Claim.

1.114. *Other Unsecured Cash* means: (i) to the extent that the ultimate aggregate amount of Allowed Other Unsecured Claims that elect to receive Other Unsecured Cash is less than \$32 million, Cash in the amount of \$4.0 million; (ii) to the extent that the ultimate aggregate amount of Allowed Other Unsecured Claims that elect to receive Other Unsecured Cash is (a)

greater than (or equal to) \$32 million but (b) less than (or equal to) \$40 million, Cash in an aggregate amount sufficient to provide each holder of an Allowed Other Unsecured Claim that elects to receive Other Unsecured Cash with a Cash distribution equal to 12.5% of the Allowed amount of such Claim; and (iii) to the extent that the ultimate aggregate amount of Allowed Other Unsecured Claims that elect to receive Other Unsecured Cash is greater than \$40 million, Cash in the amount of \$5.0 million.

1.115. *Other Unsecured Claim* means any Unsecured Claim against a Debtor other than a Noteholder Claim.

1.116. *PBGC* means the Pension Benefit Guaranty Corporation, a wholly owned United States government corporation, and an agency of the United States created by ERISA.

1.117. *Pension Plan* means the Southwest Ambulance Pension Plan.

1.118. *Person* means any individual, corporation, partnership, association, multiemployer pension plan, plan trustee, plan administrator, indenture trustee, limited liability company, organization, joint stock company, joint venture, estate, trust, governmental unit or any political subdivision thereof, Interest holder, or any other entity or organization.

1.119. *Plan* means this chapter 11 plan of reorganization proposed by the Debtors, including the exhibits and schedules hereto, as the same may be amended or modified from time to time in accordance with the provisions of the Bankruptcy Code and the terms hereof.

1.120. *Plan Consideration* means, with respect to any Class of Claims entitled to distribution under this Plan, one or more of Cash, shares of New Common Stock, Subscription Rights, or the Reorganized Debtors' incurrence of the Existing Term Loan Obligations and the Converted Term Loan Obligations.

1.121. *Plan Distribution* means the payment or distribution under the Plan of the Plan Consideration.

1.122. *Plan Documents* means the (i) Amended and Restated Secured Credit Agreement and Backstop Term Loan, (ii) the Exit LC Facility, (iii) the Stockholders Agreement (if applicable), (iv) the Registration Rights Agreement (if applicable), (v) the Rights Offering Backstop Commitment Agreement, (vi) the Certificate of Designations for the New Preferred Stock, (vii) the Amended Certificate, (viii) the Amended By-laws, (ix) the Litigation Trust Agreement, (x) the Subscription Form, (xi) the Creditor Representative Plan Supplement, and (xii) the Cooperation Agreement, each in form and substance reasonably satisfactory to (a) the Required Consenting Lenders (except for the documents set forth in (iii), (iv), (vi), (ix), (x), (xi) and (xii)), (b) the Required Consenting Noteholders, and (c) the Creditors' Committee (except for the documents set forth in (i), (ii), (iii), (iv), (vi) and (x)), to be executed, delivered, assumed, and/or performed in conjunction with the consummation of this Plan on the Effective Date.

1.123. *Plan Supplement* means the supplemental appendix to this Plan, to be filed as soon after the filing of the Plan as reasonably practicable but in no event later than seven (7) days prior to the deadline to vote to accept or reject the Plan, which will contain, among other things,

substantially final draft forms (subject to further changes) or signed copies, as the case may be, of the Plan Documents.

1.124. *Potential Action Notice* means a written notice, delivered to counsel to the Debtors by counsel to the Creditors' Committee, the Secured Lenders, and/or the Consenting Noteholders, respectively, of a claim or claims against any current or former officers, Released Directors, principals, members, employees, agents, financial advisors, attorneys, accountants, investment bankers, consultants, representatives, equity holders, partners and other professionals of the Debtors. For the avoidance of doubt, none of the Consenting Noteholders, the Secured Lenders, the DIP Lenders or the Exit Preferred Holders will be required to give a release to a current or former officer or Released Director if such Person (i) determines that the release will limit or affect any claims that may exist against other third parties or the right to access insurance proceeds if available, (ii) such Person has provided counsel to the Debtors written notice of such determination (as described in the prior sentence) on or prior to the entry of the Confirmation Order, and (iii) has not withdrawn such notice on or prior to the Confirmation Date. For the further avoidance of doubt, the delivery of a Potential Action Notice shall not limit or have any effect on Section 12.9 of this Plan.

1.125. *Preference Actions* means any and all claims of the Debtors or their Estates that could be brought under section 547 of the Bankruptcy Code or, in the alternative, based upon the same underlying facts under section 544 or 548 of the Bankruptcy Code, and the right to recover on account of any such claim under section 550 of the Bankruptcy Code.

1.126. *Prepayment* means the payment, on the Effective Date, of \$50,000,000 by the Reorganized Debtors from the proceeds of the Rights Offering to the Secured Credit Agreement Administrative Agent to prepay, on a pro rata basis, the Funded Obligations (as defined in the Restructuring Support Agreement) owed to the Secured Lenders under the Secured Credit Agreement (other than Funded Obligations resulting from draws made on any outstanding prepetition letters of credit made following the Commencement Date, which shall be reimbursed with proceeds of the Backstop Term Loan).

1.127. *Priority Non-Tax Claim* means any Claim, other than an Administrative Expense Claim, a Fee Claim and a Priority Tax Claim, entitled to priority in payment as specified in section 507(a) of the Bankruptcy Code.

1.128. *Priority Tax Claim* means any Claim of a governmental unit (as defined in section 101(27) of the Bankruptcy Code) of the kind entitled to priority in payment under section 507(a)(8) of the Bankruptcy Code.

1.129. *Professional Person(s)* means all Persons retained by order of the Bankruptcy Court to represent the Debtors or the Creditors' Committee in connection with the Reorganization Cases, pursuant to sections 327, 328, 330 or 1103 of the Bankruptcy Code, and the Fee Auditor, but excluding any ordinary course professionals retained pursuant to order of the Bankruptcy Court.

1.130. *Pro Rata Share* means, with respect to any distribution on account of an Allowed Claim, a distribution equal in amount to the ratio (expressed as a percentage) that the amount of

such Allowed Claim bears to the aggregate amount of all Allowed Claims in its Class, unless otherwise set forth herein, provided that (i) as used in Section 5.2(b)(iv), Pro Rata Share means the ratio (expressed as a percentage) that the amount of such Secured Lender's Allowed Claims in respect of Revolving Loans or Term Loans (each as defined in the Secured Credit Agreement), as the case may be, bears to the aggregate amount of all Allowed Claims that are Revolving Loans or Term Loans, respectively, and (ii) as used in Sections 5.4(b)(i), 5.4(b)(iii) and 5.5(a)(i), Pro Rata Share means the ratio (expressed as a percentage) that the amount of such Allowed Claim bears to the aggregate amount of all Allowed Noteholder Claims and all Allowed Other Unsecured Claims (for the avoidance of doubt, including those whose holders elect to receive Other Unsecured Cash pursuant to Section 5.5(a)(ii) of the Plan).

1.131. *Registration Rights Agreement* means, in the event the Debtors and the Required Consenting Noteholders determine that a Registration Rights Agreement will be executed and delivered in connection with the Plan, that certain Registration Rights Agreement by and among Reorganized RMC and the holders of New Common Stock, dated as of the Effective Date (as it may be amended or supplemented), a substantially final form of which will be annexed hereto as Exhibit G and filed as part of the Plan Supplement.

1.132. *Rejection Damages Claims* means Claims arising from the rejection of executory contracts or unexpired leases.

1.133. *Released Debtor Parties* means any current or former officers, Released Directors, principals, members, employees, agents, financial advisors, attorneys, accountants, investment bankers, consultants, representatives, equity holders, partners and other professionals of the Debtors with respect to which counsel for the Debtors (i) did not receive a timely Potential Action Notice, or (ii) received a timely Potential Action Notice that was subsequently withdrawn prior to the Confirmation Date.

1.134. *Released Directors* means, collectively, the Debtors' current and former directors who served as directors at any time from and after June 30, 2011, but not including Michael P. DiMino.

1.135. *Released Parties* means, each of, and solely in its capacity as such, (a) the Debtors and the Released Debtor Parties, (b) the Creditors' Committee and its members (solely in their capacity as members of the Creditors' Committee but not in their capacity as individual creditors), (c) the Administrative Agents, (d) the DIP Lenders, (e) the Secured Lenders, (f) the Consenting Noteholders, (g) the Exit Preferred Holders, (h) the Disbursing Agent, (i) the Notes Trustee, and (j) with respect to each of the foregoing entities in clauses (b) through (i), such entity's current affiliates, successors, assigns, subsidiaries, officers, directors, principals, members, employees, agents, financial advisors, attorneys, accountants, investment bankers, consultants, representatives, equity holders, partners and other professionals. With respect to category (j) in the preceding sentence, the individuals and entities released are released solely in the identified capacity with respect to the other Released Parties in categories (b) through (i).

1.136. *Releasing Party* means each of, and solely in its capacity as such, (a) the Creditors' Committee and its members (solely in their capacity as members of the Creditors' Committee but not in their capacity as individual creditors), (b) the Administrative Agents, (c)

the DIP Lenders, (d) the Secured Lenders, (e) the Consenting Noteholders, (f) the Exit Preferred Holders, (g) Noteholders (other than the Consenting Noteholders) that abstain from voting or voted to reject the Plan and have not also checked the box on the applicable Ballot indicating that they opt not to grant the releases provided in the Plan, (h) the holders of impaired Claims (other than the Secured Lenders) or Interests other than those who (I) have been deemed to reject the Plan, or (II) abstain from voting or voted to reject the Plan and have also checked the box on the applicable Ballot indicating that they opt not to grant the releases provided in the Plan, (i) the holders of unimpaired Claims, (j) the Notes Trustee, and (k), with respect to the foregoing entities in clauses (a) through (j), such entities' current affiliates, successors, assigns, subsidiaries, officers, directors, principals, members, employees, agents, financial advisors, attorneys, accountants, investment bankers, consultants, representatives, equity holders, partners and other professionals.

1.137. *Remaining Rights Offering Stock* means the Rights Offering Stock that is not subscribed for pursuant to the Rights Offering prior to the expiration of the Subscription Deadline.

1.138. *Reorganization Cases* means the jointly-administered cases under chapter 11 of the Bankruptcy Code commenced by the Debtors on the Commencement Date in the Bankruptcy Court and styled *In re Rural/Metro Corporation, et al.*, No. 13-11952 (KJC) (Jointly Administered).

1.139. *Reorganized Debtor* means each Debtor on and after the Effective Date.

1.140. *Reorganized RMC* means Holdings on and after the Effective Date.

1.141. *Required Backstop Parties* means Rights Offering Backstop Investors that have committed to purchasing a majority of the Rights Offering Stock pursuant to the Rights Offering Backstop Commitment Agreement.

1.142. *Required Consenting Lenders* has the meaning given to such term in the Restructuring Support Agreement.

1.143. *Required Consenting Noteholders* has the meaning given to such term in the Restructuring Support Agreement.

1.144. *Restructuring Support Agreement* means the Restructuring Support Agreement entered into by the Debtors, the Consenting Lenders and the Consenting Noteholders on or about August 4, 2013, including the term sheet annexed thereto, as modified by the Order, Pursuant to Sections 105(a) and 365(a) of the Bankruptcy Code, Authorizing the Assumption of Restructuring Support Agreement [Docket No. 217].

1.145. *Rights Offering* means the \$135,000,000 rights offering of Rights Offering Stock to be offered to the holders of Noteholder Claims as of the Rights Offering Record Date, the terms of which are set forth in Section 7.2 of this Plan.

1.146. *Rights Offering Amount* means \$135,000,000.

1.147. *Rights Offering Backstop Commitment Agreement* means the Commitment Agreement dated as of October 31, 2013, which will be annexed hereto as Exhibit H and filed as part of the Plan Supplement.

1.148. *Rights Offering Backstop Investors* means the Consenting Noteholders who have agreed to purchase the Remaining Rights Offering Stock pursuant to the Rights Offering Backstop Commitment Agreement.

1.149. *Rights Offering Backstop Notification Date* means a date that is not later than two (2) Business Days following the Subscription Deadline.

1.150. *Rights Offering Backstop Payment Date* means a date that is not later than two (2) Business Days following the applicable Rights Offering Backstop Notification Date (or such later date as approved in writing by the Debtors); provided, however, that such date shall be at least three (3) Business Days prior to the Effective Date.

1.151. *Rights Offering Purchaser* means a holder of a Noteholder Claim as of the Rights Offering Record Date (or a subsequent holder of a Noteholder Claim if transferred in accordance with Section 7.2(d)) who timely and properly executes and delivers the Subscription Form and causes its Nominee to tender its Subscription Payment Amount by wire transfer of immediately available funds to the Debtors or other entity specified in the Subscription Form prior to the expiration of the Subscription Deadline.

1.152. *Rights Offering Record Date* means the Voting Record Date, or such other date as designated in an order of the Bankruptcy Court.

1.153. *Rights Offering Stock* means the New Common Stock (which shall comprise 70% of the fully diluted New Common Stock) and New Preferred Stock to be issued and sold through the Rights Offering (including the Remaining Rights Offering Stock to be issued pursuant to the Rights Offering Backstop Commitment Agreement).

1.154. *Schedule of Rejected Contracts and Leases* means a schedule of the contracts and leases to be rejected pursuant to section 365 of the Bankruptcy Code and Section 10.1 of this Plan, which shall be filed by the Debtors at least ten (10) Business Days prior to the start of the Confirmation Hearing, as such schedule may be amended from time to time on or before the Confirmation Date.

1.155. *Secured Claim* means a Claim (a) that is secured by a Lien on Collateral to the extent of the value of such Collateral, as determined in accordance with section 506(a) of the Bankruptcy Code, or (b) to the extent that the holder thereof has a valid right of setoff pursuant to section 553 of the Bankruptcy Code, and limited to the value thereof.

1.156. *Secured Credit Agreement* means that certain Credit Agreement dated as of June 30, 2011, among WP Rocket Merger Sub Inc., Rural/Metro Corporation, the lenders party thereto, Credit Suisse AG, as Administrative Agent, Credit Suisse Securities (USA) LLC, as joint lead arranger and joint bookrunner, Citigroup Global Markets Inc., as joint lead arranger, joint bookrunner and syndication agent, and Jefferies Finance LLC, as joint bookrunner and documentation agent, as the same may have been amended, modified, and/or supplemented.

1.157. *Secured Credit Agreement Administrative Agent* means Credit Suisse AG.

1.158. *Secured Credit Agreement Documents* means, collectively, (a) the Secured Credit Agreement, and (b) all documents and instruments executed in connection therewith.

1.159. *Secured Lenders* means, collectively and as of the relevant time, those lenders that are party to the Secured Credit Agreement and the Secured Credit Agreement Administrative Agent.

1.160. *Secured Lender Claim* means any Secured Claim arising out of or in connection with the Secured Credit Agreement Documents, including any Secured Lender Fee Claim.

1.161. *Secured Lender Fee Claim* means any Claim for fees, expenses, costs and other charges of the Secured Credit Agreement Administrative Agent and the Secured Lenders, including those of their respective counsel and advisors, which are provided for in the Secured Credit Agreement Documents.

1.162. *Stockholders Agreement* means, in the event the Debtors and the Required Consenting Noteholders determine that a Stockholders Agreement will be executed and delivered in connection with the Plan, the stockholders agreement, to be dated as of the Effective Date, among Reorganized RMC and each of the Persons receiving New Common Stock under the Plan, which will be annexed hereto as Exhibit I and filed as part of the Plan Supplement.

1.163. *Subscription Agent* means Donlin, Recano & Company, Inc., or any entity designated as such by the Plan or the Debtors (with the consent of the Required Consenting Noteholders, not to be unreasonably withheld, conditioned or delayed).

1.164. *Subscription Commencement Date* means the date on which the Subscription Period commences, which shall be the earliest date reasonably practicable occurring after the Rights Offering Record Date.

1.165. *Subscription Deadline* means the date on which the Rights Offering shall expire as set forth in the Subscription Form, which date shall be the Voting Deadline.

1.166. *Subscription Form* means, collectively, the subscription form and subscription agreement to be distributed to holders of Noteholder Claims pursuant to which the holders of Noteholder Claims may exercise their Subscription Rights, which will be annexed hereto as Exhibit J.

1.167. *Subscription Payment Amount* means, with respect to a particular Rights Offering Purchaser, an amount of Cash equal to the Rights Offering Amount multiplied by such Rights Offering Purchaser's subscribed for portion of its Pro Rata Share of the Rights Offering Stock.

1.168. *Subscription Period* means the time period during which the holders of Noteholder Claims may subscribe to purchase the Rights Offering Stock, which period shall commence on the Subscription Commencement Date and expire on the Subscription Deadline.

1.169. *Subscription Right* means the right to participate in the Rights Offering, which right shall be non-transferable and non-certificated, except for, prior to the Subscription Deadline, (a) transfers by a holder of Noteholder Claims to one or more of its affiliates or another holder of Noteholder Claims, or (b) with the consent of the Required Backstop Parties and the Debtors, to a third party; provided, that for clauses (a) and (b): (i) the Subscription Rights are issued in connection with each holder's Noteholder Claims as of the Rights Offering Record Date; (ii) no transfer, assignment or other disposition of the Subscription Rights may be made except in connection with the transfer, assignment or disposition of the corresponding Notes; (iii) upon any valid exercise of Subscription Rights and payment of the applicable Subscription Payment Amount by any Rights Offering Purchaser, such Rights Offering Purchaser shall not thereafter transfer, assign or otherwise dispose of any corresponding Notes on or prior to the Effective Date or the right to receive Rights Offering Stock prior to the distribution of such Rights Offering Stock to the applicable Rights Offering Purchaser; and (iv) no transfer, assignment or other disposition of the Subscription Rights of any Rights Offering Backstop Investor may be made unless such Rights Offering Backstop Investor's transferee agrees to an assignment or transfer of such Rights Offering Backstop Investor's commitment, as set forth in the Rights Offering Backstop Commitment Agreement, to subscribe for the Rights Offering Stock in connection with such transferred Subscription Rights.

1.170. *Surety Agreements* means the surety bonds issued on behalf of, and at the request of, the Debtors to support certain customer and utility contracts prior to and during these Reorganization Cases, and any pre-petition surety indemnity agreements executed in connection therewith.

1.171. *Unclaimed Property* means any Cash or other property unclaimed or undeliverable on or after the Effective Date or date on which a Plan Distribution would have been made in respect of the relevant Allowed Claim. Unclaimed Property shall include: (a) checks (and the funds represented thereby), New Common Stock and other property mailed to a Distribution Address and returned as undeliverable without a proper forwarding address; (b) funds for uncashed checks; and (c) checks (and the funds represented thereby) and New Common Stock not mailed or delivered because no Distribution Address to mail or deliver such property was available.

1.172. *Unreleased Debtor Parties* means any current or former officers, Released Directors, principals, members, employees, agents, financial advisors, attorneys, accountants, investment bankers, consultants, representatives, equity holders, partners and other professionals of the Debtors with respect to which counsel for the Debtors receives a timely Potential Action Notice that is not subsequently withdrawn prior to the Confirmation Date. For the avoidance of doubt, pursuant to the Restructuring Support Agreement, any of the foregoing parties with respect to which counsel for the Debtors either: (i) did not receive a timely Potential Action Notice on or prior to the entry of the Confirmation Order; or (ii) received a timely Potential Action Notice that was subsequently withdrawn prior to the Confirmation Date shall be deemed a Released Debtor Party pursuant to this Plan.

1.173. *Unsecured Claim* means any Claim other than: (a) an Existing Securities Laws Claim; (b) a Secured Claim; (c) an Administrative Expense Claim; (d) a Fee Claim; (e) a Priority Tax Claim; (f) a Priority Non-Tax Claim; (g) a Claim on account of any guaranty or similar

obligation of any Debtor relating to the foregoing types of Claims; and (h) an Intercompany Claim.

1.174. *U.S. Trustee Fees* means fees arising under 28 U.S.C. § 1930(a)(6) or accrued interest thereon arising under 31 U.S.C. § 3717.

1.175. *Voting Deadline* means December 9, 2013 at 5:00 p.m. prevailing New York time, the date and time by which all Ballots must be received by the Claims Agent, or such other date and time as may be established by the Bankruptcy Court.

1.176. *Voting Record Date* means the date for determining which holders of Claims are entitled to receive the Disclosure Statement and vote to accept or reject this Plan, as applicable, which date is November 5, 2013, as set forth in the Disclosure Statement Order.

B. *Interpretation; Application of Definitions and Rules of Construction.*

Unless otherwise specified, all section or exhibit references in this Plan are to the respective section in, or exhibit to, this Plan. The words “herein,” “hereof,” “hereto,” “hereunder,” and other words of similar import refer to this Plan as a whole and not to any particular section, subsection, or clause contained therein. Any capitalized term used herein that is not defined herein shall have the meaning assigned to that term in the Bankruptcy Code. Except for the rules of construction contained in sections 102(5) of the Bankruptcy Code, which shall not apply, the rules of construction contained in section 102 of the Bankruptcy Code shall apply to the construction of the Plan (specifically including section 102(3) providing that the words “includes” and “including” are not limiting). Any reference in this Plan to a contract, instrument, release, indenture, or other agreement or documents being in a particular form or on particular terms and conditions means that such document shall be substantially in such form or substantially on such terms and conditions, and any reference in this Plan to an existing document or exhibit filed or to be filed means such document or exhibit as it may have been or may be amended, modified, or supplemented. The headings in this Plan are for convenience of reference only and shall not limit or otherwise affect the provisions hereof. To the extent there is an inconsistency between any of the provisions of this Plan and any of the provisions contained in the Plan Documents to be entered into as of the Effective Date, the Plan Documents shall control.

C. *Appendices and Plan Documents.*

All Plan Documents and appendices to the Plan are incorporated into the Plan by reference and are a part of the Plan as if set forth in full herein. Holders of Claims and Interests may inspect a copy of the Plan Documents, once filed, in the Office of the Clerk of the Bankruptcy Court during normal business hours, or obtain a copy of the Plan Documents by a written request sent to the following address:

Willkie Farr & Gallagher LLP
787 Seventh Avenue
New York, New York 10019
Attention: Andrew Mordkoff, Esq.
Telephone: (212) 728-8000

ARTICLE II.

RESOLUTION OF CERTAIN INTER-CREDITOR AND INTER-DEBTOR ISSUES

2.1. *Comprehensive Settlement of Claims and Controversies.*

Pursuant to Bankruptcy Rule 9019, and in consideration for the classification, distribution and other benefits provided under the Plan, the provisions of the Plan shall constitute a good faith compromise and settlement of all Claims and controversies resolved pursuant to the Plan, including all claims arising prior to the Commencement Date, whether known or unknown, foreseen or unforeseen, asserted or unasserted, by or against any Released Party, or holders of Claims, arising out of, relating to or in connection with the business or affairs of or transactions with the Debtors. The entry of the Confirmation Order shall constitute the Bankruptcy Court's approval of each of the foregoing compromises or settlements, and all other compromises and settlements provided for in the Plan, and the Bankruptcy Court's findings shall constitute its determination that such compromises and settlements are in the best interests of the Debtors, the Estates, creditors and other parties in interest, and are fair, equitable and within the range of reasonableness. The provisions of the Plan, including its release, injunction, exculpation and compromise provisions, are mutually dependent and non-severable.

2.2. *Substantive Consolidation of Debtors for Purposes of Voting, Confirmation and Distribution.*

(a) This Plan provides for substantive consolidation of the Debtors' Estates, but solely for purposes of voting, confirmation, and making distributions to the holders of Allowed Claims under this Plan. On the Effective Date: (a) all guarantees of any Debtor of the payment, performance or collection of another Debtor with respect to Claims against such Debtor shall be eliminated and cancelled; and (b) any obligation of any Debtor and all guarantees by a Debtor with respect to Claims against one or more of the other Debtors shall be treated as a single obligation. On the Effective Date, and in accordance with the terms of this Plan and the consolidation of the assets and liabilities of the Debtors, all Claims based upon guarantees of collection, payment, or performance made by a Debtor as to the obligation of another Debtor shall be released and of no further force and effect. Except as set forth in this Section 2.2, such substantive consolidation shall not affect (a) the legal and corporate structure of the Reorganized Debtors, or (b) any obligations under any leases or contracts assumed in this Plan or otherwise after the Commencement Date. The Debtors reserve the right to seek confirmation of the Plan without implementing substantive consolidation (including, without limitation, in the event the Court determines that substantive consolidation of the Debtors as provided for above is not appropriate), and to request that the Court approve the treatment of and distribution to the different Classes under the Plan on a Debtor-by-Debtor basis. In the event the Debtors seek confirmation of the Plan without implementing substantive consolidation of the Debtors as provided for above, any vote in favor of the Plan on a substantively consolidated basis, shall be deemed a vote in favor of the Plan of each of the applicable Debtors on an individual Debtor basis, provided that such substantive consolidation does not reduce the Other Unsecured Cash or the percentage recovery of those holders of Allowed Other Unsecured Claims who elect to receive Other Unsecured Cash pursuant to Section 5.5(a)(ii) of the Plan or otherwise materially decrease the consideration provided under the Plan with respect to the applicable Claim holder.

(b) Notwithstanding anything to the contrary herein, on or after the Effective Date, any and all Intercompany Claims will be adjusted (including by contribution, distribution in exchange for new debt or equity, or otherwise), paid, continued, or discharged to the extent reasonably determined appropriate by the Reorganized Debtors. Any such transaction may be effected on or subsequent to the Effective Date without any further action by the Bankruptcy Court or by the stockholders of any of the Reorganized Debtors. For the avoidance of doubt, Intercompany Claims are not entitled to any Plan Distributions of any kind.

(c) Notwithstanding the substantive consolidation of the Estates for the purposes set forth in Section 2.2(a) herein, each Reorganized Debtor shall pay all U.S. Trustee Fee Claims on all disbursements, including Plan Distributions and disbursements in and outside of the ordinary course of business, until the entry of a final decree in its Reorganization Case, dismissal of its Reorganization Case, or conversion of its Reorganization Case to a case under chapter 7 of the Bankruptcy Code.

2.3. *No Plan Distributions to Equity Interests.*

No Plan Distributions shall be made on account of any Interests in any Debtor regardless of whether such Interests are held by a Person which is not a Debtor; provided, however, that any Debtor that holds Intercompany Interests shall retain such Interests solely for the purpose of maintaining the existing corporate structure of the Debtors and the Reorganized Debtors.

ARTICLE III.

ADMINISTRATIVE EXPENSE CLAIMS, FEE CLAIMS, U.S. TRUSTEE FEES AND PRIORITY TAX CLAIMS

All Claims and Interests, except DIP Claims, Administrative Expense Claims, Fee Claims, U.S. Trustee Fees, Priority Tax Claims and Intercompany Claims, are placed in the Classes set forth in Article IV below. In accordance with section 1123(a)(1) of the Bankruptcy Code, DIP Claims, Administrative Expense Claims, Fee Claims, U.S. Trustee Fees, Priority Tax Claims and Intercompany Claims of the Debtors have not been classified, and the holders thereof are not entitled to vote on this Plan. A Claim or Interest is placed in a particular Class only to the extent that the Claim or Interest falls within the description of that Class and is classified in other Classes to the extent that any portion of the Claim or Interest falls within the description of such other Classes.

3.1. *DIP Claims*

The DIP Claims shall be deemed to be Allowed Claims under the Plan. The DIP Claims shall be satisfied in full, on the Effective Date, by the termination of all commitments under the DIP Credit Agreement and indefeasible payment in full in Cash of all outstanding obligations thereunder. Until so satisfied in full, the DIP Agent and DIP Lenders shall retain all rights, Claims and Liens available pursuant to the DIP Credit Agreement and the DIP Order.

3.2. *Administrative Expense Claims.*

(a) Time for Filing Administrative Expense Claims.

The holder of an Administrative Expense Claim, other than the holder of:

- (i) a Fee Claim;
- (ii) an Administrative Expense Claim arising under the DIP Order;
- (iii) an Administrative Expense Claim that has been Allowed on or before the Effective Date;
- (iv) a trade claim for an expense or liability incurred and payable in the ordinary course of business by a Debtor after the Commencement Date;
- (v) an Administrative Expense Claim on account of fees and expenses incurred on or after the Commencement Date by ordinary course professionals retained by the Debtors pursuant to an order of the Bankruptcy Court;
- (vi) an Administrative Expense Claim held by a current officer, director or employee of the Debtors for indemnification, contribution, or advancement of expenses pursuant to (A) any Debtor's certificate of incorporation, by-laws, or similar organizational document or (B) any indemnification or contribution agreement approved by the Bankruptcy Court; provided, however, that nothing set forth herein shall be deemed to elevate any indemnification claims for prepetition acts or omissions to Administrative Claim status;
- (vii) an Administrative Expense Claim arising, in the ordinary course of business, out of the employment by one or more Debtors of an individual from and after the Commencement Date, but only to the extent that such Administrative Expense Claim is solely for outstanding wages, commissions, accrued benefits, or reimbursement of business expenses;
- (viii) a Notes Trustee Fee Claim;
- (ix) a Committee Member Expense Claim; and
- (x) a claim for U.S. Trustee Fees,

(b) must file with the Bankruptcy Court and serve on the Debtors or the Reorganized Debtors, as applicable, the Claims Agent, the Creditors' Committee or the Creditor Representative, as applicable, and the Office of the United States Trustee, proof of such Administrative Expense Claim **within thirty (30) days after the Effective Date** (the "**Administrative Bar Date**"). Such proof of Administrative Expense Claim must include at a minimum (i) the name of each Debtor that is purported to be liable for the Administrative Expense Claim, (ii) the name of the holder of the Administrative Expense Claim, (iii) the amount

of the Administrative Expense Claim, (iv) the basis of the Administrative Expense Claim, and (v) supporting documentation for the Administrative Expense Claim. **FAILURE TO FILE AND SERVE SUCH PROOF OF ADMINISTRATIVE EXPENSE CLAIM TIMELY AND PROPERLY SHALL RESULT IN THE ADMINISTRATIVE EXPENSE CLAIM BEING FOREVER BARRED AND DISCHARGED IN THESE REORGANIZATION CASES.**

(c) Treatment of Administrative Expense Claims.

Except to the extent that a holder of an Allowed Administrative Expense Claim agrees to a different treatment, on, or as soon thereafter as is reasonably practicable, the later of the Effective Date and the first Business Day after the date that is thirty (30) days after the date an Administrative Expense Claim becomes an Allowed Claim, the holder of such Allowed Administrative Expense Claim shall receive Cash in an amount equal to such Allowed Claim; provided, however, that Allowed Administrative Expense Claims representing liabilities incurred in the ordinary course of business by the Debtors, as debtors in possession, shall be paid by the Debtors or the Reorganized Debtors, as applicable, in the ordinary course of business, consistent with past practice and in accordance with the terms and subject to the conditions of any orders or agreements governing, instruments evidencing, or other documents relating to, such transactions.

3.3. Fee Claims.

(a) Time for Filing and Allowance of Fee Claims.

Any Professional Person seeking allowance by the Bankruptcy Court of a Fee Claim shall file and serve its respective final application for allowance of compensation for services rendered and reimbursement of expenses incurred prior to the Effective Date no later than thirty (30) days after the Effective Date. **FAILURE TO FILE AND SERVE SUCH FEE APPLICATION TIMELY AND PROPERLY SHALL RESULT IN THE FEE CLAIM BEING FOREVER BARRED AND DISCHARGED.**

Objections to Fee Claims, if any, must be filed and served pursuant to the procedures set forth in the Confirmation Order no later than fifty-one (51) days after the Effective Date or such other date as established by the Bankruptcy Court.

A Fee Claim shall be Allowed to the extent provided by a Final Order of the Bankruptcy Court.

(b) Treatment of Fee Claims.

A Fee Claim in respect of which a final fee application has been properly filed and served pursuant to Section 3.3(a) of this Plan shall be payable in Cash from the funds held in the Fee Claim Reserve Account by the Reorganized Debtors to the extent approved by a Final Order of the Bankruptcy Court and the holder of such Allowed Fee Claim shall receive such payment on or before the second Business Day after such Fee Claim becomes an Allowed Fee Claim. On or prior to the Effective Date, each holder of a Fee Claim shall submit to the Debtors, the Consenting Lenders, the Consenting Noteholders and the Creditors' Committee reasonable estimates of any Fee Claims that may accrue prior to the Effective Date that have not been included in a monthly fee statement or interim fee application submitted by such Professional

Person. If a holder of a Fee Claim does not provide a reasonable estimate, the Debtors may estimate the Fee Claims of such Professional Person that may accrue prior to the Effective Date that have not been included in a monthly fee statement or interim fee application. The aggregate amount of Fee Claims of Professional Persons (i) incurred but unpaid through the Effective Date that have been included in a prior monthly fee statement or interim fee application and (ii) that may accrue prior to the Effective Date that have not been included in a monthly fee statement or interim fee application as estimated in accordance with this Section 3.3, shall comprise the Fee Claim Reserve Amount. On the Effective Date, the Debtors shall establish and fund the Fee Claim Reserve Account with Cash equal to the aggregate Fee Claim Reserve Amount. For the avoidance of doubt, the Fee Claim Reserve Account shall be a segregated account, for the benefit of holders of Allowed Fee Claims, and shall be free and clear of all Claims and Interests including any and all liens, claims, pledges, charges, or encumbrances, including any liens securing the exit facilities, and not subject in any way to attachment seizure or setoff. To the extent and at such time as all Allowed Fee Claims have been paid in full, any funds remaining in the Fee Claim Reserve Account shall become the sole and exclusive property of the Reorganized Debtors.

Notwithstanding anything herein to the contrary, the Fee Auditor shall continue to perform the duties set forth in the Fee Auditor Order until all final fee applications have been approved or denied by the Bankruptcy Court. Following the Effective Date, the Reorganized Debtors shall pay in cash, within thirty (30) days of receipt of an invoice from the Fee Auditor, all actual, reasonable fees and expenses of the Fee Auditor that are incurred after the Effective Date, without the need for any further authorization from the Bankruptcy Court. In the event that the Reorganized Debtors object to payment of such invoice from the Fee Auditor for post-Effective Date fees and expenses, in whole or in part, and the parties cannot resolve such objection after good faith negotiation, the Bankruptcy Court shall retain jurisdiction to make a determination as to the extent to which the invoice shall be paid by the Reorganized Debtors.

3.4. *U.S. Trustee Fees.*

On the Effective Date or as soon as reasonably practicable thereafter, the Debtors or Reorganized Debtors shall pay all U.S. Trustee Fees.

3.5. *Priority Tax Claims.*

Except to the extent that a holder of an Allowed Priority Tax Claim agrees to less favorable treatment, each holder of an Allowed Priority Tax Claim shall receive, in the Reorganized Debtors' discretion, either (a) on, or as soon thereafter as is reasonably practicable, the later of the Effective Date and the first Business Day after the date that is thirty (30) days after the date a Priority Tax Claim becomes an Allowed Claim, Cash in an amount equal to such Claim, or (b) deferred Cash payments following the Effective Date, over a period ending not later than five (5) years after the Commencement Date, in an aggregate amount equal to the Allowed amount of such Priority Tax Claim (with any interest to which the holder of such Priority Tax Claim may be entitled to be calculated in accordance with section 511 of the Bankruptcy Code); provided, however, that all Allowed Priority Tax Claims that are not due and payable on or before the Effective Date shall be paid in the ordinary course of business as they become due.

ARTICLE IV.

CLASSIFICATION OF CLAIMS AND INTERESTS

4.1. Classification of Claims and Interests.

The following table designates the Classes of Claims against and Interests in the Debtors, and specifies which Classes are (a) impaired or unimpaired by this Plan, (b) entitled to vote to accept or reject this Plan in accordance with section 1126 of the Bankruptcy Code, or (c) deemed to accept or reject this Plan.

<u>Class</u>	<u>Designation</u>	<u>Impairment</u>	<u>Entitled to Vote</u>
Class 1	Priority Non-Tax Claims	No	No (Deemed to accept)
Class 2	Secured Lender Claims	Yes	Yes
Class 3	Other Secured Claims	No	No (Deemed to accept)
Class 4	Noteholder Claims	Yes	Yes
Class 5	Other Unsecured Claims	Yes	Yes
Class 6	Existing Securities Laws Claims	Yes	No (Deemed to reject)
Class 7	Existing Common Stock Interests and Existing Securities Laws Claims on Account Thereof	Yes	No (Deemed to reject)

4.2. Unimpaired Classes of Claims.

The following Classes of Claims are unimpaired and, therefore, deemed to have accepted this Plan and are not entitled to vote on this Plan under section 1126(f) of the Bankruptcy Code.

- (a) Class 1: Class 1 consists of all Allowed Priority Non-Tax Claims.
- (b) Class 3: Class 3 consists of all Allowed Other Secured Claims.

4.3. Impaired Classes of Claims and Interests.

The following Classes of Claims are impaired and holders of Allowed Claims in such Classes, as of the Voting Record Date, are entitled to vote on this Plan:

- (a) Class 2: Class 2 consists of all Allowed Secured Lender Claims.
- (b) Class 4: Class 4 consists of all Allowed Noteholder Claims
- (c) Class 5: Class 5 consists of all Allowed Other Unsecured Claims

The following Classes of Claims and Interests are impaired and deemed to have rejected this Plan and, therefore, are not entitled to vote on this Plan under section 1126(g) of the Bankruptcy Code:

- (d) Class 6: Class 6 consists of all Existing Securities Laws Claims.

(e) Class 7: Class 7 consists of all Existing Common Stock Interests and Existing Securities Laws Claims on Account Thereof.

4.4. *Separate Classification of Other Secured Claims.*

Although all Other Secured Claims have been placed in one Class for purposes of nomenclature, each Other Secured Claim, to the extent secured by a Lien on Collateral different than that securing any other Other Secured Claims, shall be treated as being in a separate sub-Class for the purpose of receiving Plan Distributions.

ARTICLE V.

TREATMENT OF CLAIMS AND INTERESTS

5.1. *Priority Non-Tax Claims (Class 1).*

(a) Treatment: The legal, equitable and contractual rights of the holders of Class 1 Claims are unaltered by this Plan. Except to the extent that a holder of an Allowed Priority Non-Tax Claim agrees to less favorable treatment, on, or as soon thereafter as is reasonably practicable, the later of the Effective Date and the first Monthly Distribution Date after the date a Priority Non-Tax Claim becomes an Allowed Claim, the holder of such Allowed Priority Non-Tax Claim shall receive Cash in an amount equal to such Claim. For the avoidance of doubt, holders of an Allowed Claim entitled to administrative expense status pursuant to section 503(b)(9) of the Bankruptcy Code shall receive Cash in an amount equal to such Claim on the Effective Date in accordance with section 1129(a)(9)(A) of the Bankruptcy Code, except to the extent that such holder agrees to less favorable treatment.

(b) Voting: In accordance with section 1126(f) of the Bankruptcy Code, the holders of Allowed Priority Non-Tax Claims are conclusively presumed to accept this Plan and the votes of such holders will not be solicited with respect to such Allowed Priority Non-Tax Claims.

5.2. *Secured Lender Claims (Class 2).*

(a) Allowance: On the Effective Date, the Secured Lender Claims shall be deemed Allowed in the aggregate amount of \$427,302,230.

(b) Treatment: Except to the extent that a holder of an Allowed Secured Lender Claim agrees to different treatment, the following treatment shall constitute full and final satisfaction of each Allowed Secured Lender Claim:

(i) payment in Cash on the Effective Date of its Pro Rata Share of the Secured Lender Fee Claims (which, as applicable, may be paid directly to the Secured Lenders' counsel and advisors) to extent unpaid during the course of the Reorganization Cases;

(ii) receipt of the Prepayment by the Secured Credit Agreement Administrative Agent on the Effective Date;

(iii) the entry by the Reorganized Debtors into the Amended and Restated Secured Credit Agreement on the Effective Date; and

(iv) in respect of Senior Secured Claims constituting (A) “Revolving Loans” under and as defined in the Secured Credit Agreement, the receipt of its Pro Rata Share of the Converted Term Loan Obligations and (B) “Term Loans” under and as defined in the Secured Credit Agreement, the receipt of its Pro Rata Share of the Existing Term Loan Obligations, in each case, on the Effective Date.

(c) Voting: The Secured Lender Claims are impaired Claims, and holders of such Claims are entitled to vote to accept or reject the Plan.

5.3. Other Secured Claims (Class 3).

(a) Treatment: The legal, equitable and contractual rights of the holders of Class 3 Claims are unaltered by this Plan. Except to the extent that a holder of an Allowed Other Secured Claim agrees to less favorable treatment, on, or as soon thereafter as is reasonably practicable, the later of the Effective Date and the first Monthly Distribution Date after the date an Other Secured Claim becomes an Allowed Claim, each holder of such Allowed Other Secured Claim shall receive, at the election of the Reorganized Debtors: (i) Cash in an amount equal to such Allowed Claim; (ii) such other treatment that will render the Allowed Other Secured Claim unimpaired pursuant to section 1124 of the Bankruptcy Code, or (iii) receive the collateral securing its Allowed Claim; provided, however, that Class 3 Claims incurred by a Debtor in the ordinary course of business may be paid in the ordinary course of business in accordance with the terms and conditions of any agreements relating thereto, in the discretion of the applicable Debtor or Reorganized Debtor, without further notice to or order of the Bankruptcy Court. Each holder of an Allowed Other Secured Claim shall retain the Liens securing its Allowed Other Secured Claim as of the Effective Date until full and final payment of such Allowed Other Secured Claim is made as provided herein. On the full payment or other satisfaction of such Allowed Claims in accordance with the Plan, the Liens securing such Allowed Other Secured Claim shall be deemed released, terminated and extinguished, in each case without further notice to or order of the Bankruptcy Court, act or action under applicable law, regulation, order or rule or the vote, consent, authorization or approval of any Person.

(b) Voting: In accordance with section 1126(f) of the Bankruptcy Code, the holders of Allowed Other Secured Claims are conclusively presumed to accept this Plan and are not entitled to vote to accept or reject the Plan.

5.4. Noteholder Claims (Class 4).

(a) Allowance: On the Effective Date, the Noteholder Claims shall be deemed Allowed in the following aggregate amounts, including accrued and unpaid interest owing as of the Commencement Date: (i) Noteholder Claims on account of Notes issued pursuant to the June 30 Indenture, \$211,247,855; and (ii) Noteholder Claims on account of Notes issued pursuant to the February 3 Indenture, \$ 100,970,539.

(b) Treatment: Except to the extent that a holder of an Allowed Noteholder Claim agrees to different treatment, the following shall constitute full and final satisfaction of

each Allowed Noteholder Claim:

(i) receipt of its Pro Rata Share among all Allowed Noteholder Claims and all Allowed Other Unsecured Claims (for the avoidance of doubt, including those whose holders elect to receive Other Unsecured Cash pursuant to Section 5.5(a)(ii) of the Plan) of 100% of the New Common Stock, subject to dilution only by: (A) the options to purchase the New Common Stock that may be issued to the Reorganized Debtors' post-Effective Date directors, officers and employees; and (B) the shares of New Common Stock issued pursuant to the Rights Offering (including any New Common Stock issued pursuant to the Rights Offering Backstop Commitment Agreement);

(ii) Subscription Rights to subscribe for its Pro Rata Share of the Rights Offering Stock for an aggregate purchase price equal to the Subscription Payment Amount;

(iii) Receipt of its Pro Rata Share among all Allowed Noteholder Claims and all Allowed Other Unsecured Claims of the Litigation Trust Interests; and

(iv) Net proceeds of Estate Accounting-Related Causes of Action shared on a pro rata basis among the Litigation Trust Beneficiaries.

For the avoidance of doubt, any New Common Stock that would have been issued to those holders of Allowed Other Unsecured Claims receiving Other Unsecured Cash if they instead elected to receive New Common Stock pursuant to Section 5.5(a)(i) of the Plan shall be distributed on a pro rata basis to holders of Allowed Noteholder Claims based on their Pro Rata Share among all Allowed Noteholder Claims.

(c) Voting: The Noteholder Claims are impaired Claims, and holders of such Claims are entitled to vote to accept or reject the Plan.

5.5. *Other Unsecured Claims (Class 5).*

(a) Treatment: Except to the extent that a holder of an Allowed Other Unsecured Claim agrees to different treatment, each holder of an Allowed Other Unsecured Claim may elect either of the following alternative treatments in full and final satisfaction of each Allowed Other Unsecured Claim:

(i) receipt of (A) its Pro Rata Share among all Allowed Noteholder Claims and all Allowed Other Unsecured Claims (for the avoidance of doubt, including those whose holders elect to receive Other Unsecured Cash pursuant to Section 5.5(a)(ii) of the Plan) of 100% of the New Common Stock, subject to dilution only by: (I) the options to purchase the New Common Stock that may be issued to the Reorganized Debtors' post-Effective Date directors, officers and employees; and (II) the shares of New Common Stock issued pursuant to the Rights Offering (including any New Common Stock issued pursuant to the Rights

Offering Backstop Commitment Agreement), (B) its Pro Rata Share among all Allowed Noteholder Claims and all Allowed Other Unsecured Claims of the Litigation Trust Interests, and (C) net proceeds of Estate Accounting-Related Causes of Action shared on a pro rata basis among the Litigation Trust Beneficiaries; or

(ii) receipt of (A) on a pro rata basis among all holders of Allowed Other Unsecured Claims that make this election, the Other Unsecured Cash, (B) its Pro Rata Share among all Allowed Noteholder Claims and all Allowed Other Unsecured Claims of the Litigation Trust Interests, and (C) net proceeds of Estate Accounting-Related Causes of Action shared on a pro rata basis among the Litigation Trust Beneficiaries.

Any holder of an Other Unsecured Claim, that becomes an Allowed Other Unsecured Claim, that does not make an affirmative election with respect to its treatment shall be deemed to have irrevocably elected to receive the consideration set forth in clause (ii) of this Section 5.5(a). For the avoidance of doubt, any New Common Stock that would have been issued to those holders of Allowed Other Unsecured Claims receiving Other Unsecured Cash if they instead elected to receive New Common Stock pursuant to Section 5.5(a)(i) of the Plan shall be distributed on a pro rata basis to holders of Allowed Noteholder Claims based on their Pro Rata Share among all Allowed Noteholder Claims.

(b) Voting: The Other Unsecured Claims are impaired Claims, and holders of such Claims are entitled to vote to accept or reject the Plan.

5.6. Existing Securities Laws Claims (Class 6).

(a) Treatment: Persons holding Existing Securities Laws Claims shall not receive or retain any distribution under the Plan on account of such Existing Securities Laws Claims.

(b) Voting: In accordance with section 1126(g) of the Bankruptcy Code, Persons holding Existing Securities Laws Claims are conclusively presumed to reject this Plan on account of such Existing Securities Laws Claims and are not entitled to vote to accept or reject the Plan.

5.7. Existing Common Stock Interests and Existing Securities Laws Claims on Account Thereof (Class 7).

(a) Treatment: Existing Common Stock shall be cancelled and holders of Existing Common Stock Interests and Existing Securities Laws Claims on account thereof shall not be entitled to any distribution under the Plan.

(b) Voting: In accordance with section 1126(g) of the Bankruptcy Code, the holders of Existing Common Stock Interests and Existing Securities Laws Claims on account thereof are conclusively presumed to reject this Plan and are not entitled to vote to accept or reject the Plan.

ARTICLE VI.

ACCEPTANCE OR REJECTION OF THE PLAN; EFFECT OF REJECTION BY ONE OR MORE CLASSES OF CLAIMS OR EQUITY INTERESTS

6.1. *Class Acceptance Requirement.*

As is required by section 1126 of the Bankruptcy Code, a Class of Claims shall have accepted the Plan if it is accepted by at least two-thirds (2/3) in amount and more than one-half (1/2) in number of the Allowed Claims in such Class that have voted on the Plan.

6.2. *Confirmation Pursuant to Section 1129(b) of the Bankruptcy Code or “Cramdown”.*

Because certain Classes are deemed to have rejected this Plan, the Debtors will request confirmation of this Plan under section 1129(b) of the Bankruptcy Code. The Debtors reserve the right, with the consent of the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors’ Committee (which consents shall not be unreasonably withheld or delayed), to alter, amend, modify, revoke or withdraw this Plan or any Plan Document in order to satisfy the requirements of section 1129(b) of the Bankruptcy Code, if necessary. For the avoidance of doubt, nothing in this provision shall alter any requirement in Section 1.122 that a Plan Document must be in form and substance reasonably satisfactory to the Required Consenting Lenders, the Required Consenting Noteholders, or the Creditors’ Committee, as applicable and to the extent set forth therein.

6.3. *Elimination of Vacant Classes.*

Any Class of Claims or Interests that does not have a holder of an Allowed Claim or Allowed Interest or a Claim or Interest temporarily Allowed by the Bankruptcy Court as of the date of the Confirmation Hearing shall be deemed eliminated from the Plan for purposes of voting to accept or reject the Plan and for purposes of determining acceptance or rejection of the Plan by such Class pursuant to section 1129(a)(8) of the Bankruptcy Code.

6.4. *Voting Classes.*

If a Class contains Claims or Interests eligible to vote and no holders of Claims or Interests eligible to vote in such Class vote to accept or reject the Plan, the Debtors may request a ruling at the Confirmation Hearing that the Plan shall be deemed accepted by the holders of such Claims or Interests in such Class.

6.5. *Confirmation of All Cases.*

Except as otherwise specified herein, the Plan shall not be deemed to have been confirmed unless and until the Plan has been confirmed as to each of the Debtors; provided, however, that the Debtors, in their sole discretion and with the consent of the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the

Committee Plan Issues) the Creditors' Committee (which consents shall not be unreasonably withheld or delayed), may at any time waive this Section 6.5.

ARTICLE VII.

MEANS FOR IMPLEMENTATION

7.1. *Restructuring Transaction.*

On or as of the Effective Date, the Plan Distributions shall be effectuated pursuant to the following transactions (collectively, the "**Restructuring Transaction**"):

(a) pursuant to sections 1141(b) and (c) of the Bankruptcy Code, and except as otherwise provided in the Plan, the property of each Estate shall vest in the applicable Reorganized Debtor, free and clear of all Claims and Interests including any and all claims, liens, encumbrances, charges, and other interests, except as provided in the Plan, the Amended and Restated Secured Credit Agreement, the Exit LC Facility, the other Plan Documents or the Confirmation Order. The Reorganized Debtors may operate their businesses and may use, acquire, and dispose of property free of any restrictions of the Bankruptcy Code or the Bankruptcy Rules and in all respects as if there were no pending case under any chapter or provision of the Bankruptcy Code, except as provided herein;

(b) all Existing Common Stock Interests shall be deemed cancelled as of the Effective Date. Reorganized RMC shall issue the New Common Stock pursuant to the terms of the Plan and, in the event the Debtors and the Required Consenting Noteholders determine that a Stockholders Agreement and/or Registration Rights Agreement will be executed and delivered in connection with the Plan, enter into the Stockholders Agreement and/or the Registration Rights Agreement;

(c) Reorganized RMC and certain of the Reorganized Debtors shall enter into the Amended and Restated Secured Credit Agreement, the Exit LC Facility and the Backstop Term Loan;

(d) Reorganized RMC shall issue the Rights Offering Stock to the Rights Offering Purchasers;

(e) the Debtors shall consummate the Plan by (i) making distributions of the New Common Stock and Cash, (ii) entering into the Stockholders Agreement (if applicable), the Registration Rights Agreement (if applicable), the Amended and Restated Secured Credit Agreement, the Exit LC Facility, and the Backstop Term Loan, and (iii) issuing the Rights Offering Stock; and

(f) the releases and exculpation set forth in Sections 12.8 and 12.9 herein, which are an essential element of the Restructuring Transaction, shall become effective.

7.2. *Rights Offering.*

(a) **Issuance of Rights.** Each holder of a Noteholder Claim as of the Rights

Offering Record Date will receive a Subscription Form to subscribe for its Pro Rata Share of the Rights Offering Stock for an aggregate purchase price equal to the applicable Subscription Payment Amount. In accordance with the Rights Offering Backstop Commitment Agreement, the Rights Offering Backstop Investors have committed to purchase all Remaining Rights Offering Stock. The Rights Offering Stock, including the Remaining Rights Offering Stock, will be issued to the Rights Offering Purchasers and/or the Rights Offering Backstop Investors, as applicable, for an aggregate purchase price equal to the Rights Offering Amount. On the Effective Date, Reorganized RMC shall be authorized to consummate the transactions contemplated by the Rights Offering and the Rights Offering Backstop Commitment Agreement, including any agreement or document entered into in connection therewith, and all such agreements and documents shall become effective and binding in accordance with their respective terms (to the extent not effective and binding prior to the Effective Date) and conditions upon the parties thereto, in each case without further notice to or order of the Bankruptcy Court, act or action under applicable law, regulation, order, or rule or the vote, consent, authorization or approval of any Person.

(b) Subscription Period. The Rights Offering shall commence on the Subscription Commencement Date and shall expire on the Subscription Deadline. Each holder of a Noteholder Claim as of the Rights Offering Record Date (or a subsequent holder of a Noteholder Claim if transferred in accordance with Section 7.2(d)) that intends or desires to participate in the Rights Offering must affirmatively elect to exercise its Subscription Rights by (i) completing and returning its Subscription Form to the entities specified in the applicable Subscription Form (and causing its Nominee to complete and return any required Subscription Form to the entities specified in the applicable Nominee's Subscription Form), and (ii) causing its Nominee to tender its Subscription Payment Amount by wire transfer of immediately available funds such that the Subscription Form(s) of the holder of a Noteholder Claim and its Nominee and the Subscription Payment Amount are actually received by the Subscription Agent on or prior to the Subscription Deadline in accordance with the terms of this Plan and the Subscription Form(s). After the Subscription Deadline, all Remaining Rights Offering Stock shall be allocated to and purchased by the Rights Offering Backstop Investors, in accordance with the terms and conditions of the Backstop Commitment Agreement.

(c) Exercise of Subscription Rights and Payment of Subscription Payment Amount. On the Subscription Commencement Date, the Subscription Agent will mail the Subscription Form to each holder of a Noteholder Claim and their applicable Nominees known as of the Rights Offering Record Date, together with appropriate instructions for the proper completion, due execution, and timely delivery of the Subscription Form, as well as instructions for the payment of the Subscription Payment Amount for that portion of the Subscription Rights sought to be exercised by such Person. The Debtors may adopt such additional detailed procedures consistent with the provisions of this Plan to more efficiently administer the exercise of the Subscription Rights. In order to exercise the Subscription Rights, each holder of a Noteholder Claim as of the Rights Offering Record Date must (i) return a duly completed Subscription Form (making a binding and irrevocable commitment to participate in the Rights Offering) to the entities specified in the applicable Subscription Form (and causing its Nominee to complete and return any required Subscription Form to the entities specified in the applicable Nominee's Subscription Form), and (ii) cause its applicable Nominee to tender its Subscription Payment Amount by wire transfer of immediately available funds to the Subscription Agent,

such that the Subscription Form(s) of the holder of a Noteholder Claim and its Nominee and the Subscription Payment Amount are actually received by the Subscription Agent on or before the Subscription Deadline. All payments for the exercise of Subscription Rights received shall be held in trust in a separate account free and clear of all liens, claims and encumbrances until the Effective Date. In the event the conditions to the Effective Date are not met or waived (and to the extent not waived, cured within ten (10) Business Days), such payments shall be promptly returned, without accrual or payment of any interest thereon, to the applicable Rights Offering Purchaser, without reduction, offset or counter-claim. If the Subscription Agent for any reason does not receive from a given holder of Subscription Rights a duly completed Subscription Form (and a duly completed Subscription Form of such holder's Nominee) and the applicable Subscription Payment Amount on or prior to the Subscription Deadline, then such holder shall be deemed to have forever and irrevocably relinquished and waived its right to participate in the Rights Offering and such rights shall be allocated to the Rights Offering Backstop Investors. On the Rights Offering Backstop Notification Date, the Subscription Agent will notify each Rights Offering Backstop Investor of its portion of the Remaining Rights Offering Stock that such Rights Offering Backstop Investor is obligated to purchase pursuant to the Rights Offering Backstop Commitment Agreement and the purchase price therefor. Each Rights Offering Backstop Investor must tender its Subscription Payment Amount for its portion of the Remaining Rights Offering Stock to the Debtors so that it is actually received on or prior to the Rights Offering Backstop Payment Date.

(d) No Transfer; Detachment Restrictions; No Revocation. The Subscription Rights are not transferable or detachable, except for (a) transfers by a holder of Noteholder Claims to one or more of its affiliates or another holder of Noteholder Claims, or (b) with the consent of the Required Backstop Parties and the Debtors, to a third party; provided, that for clauses (a) and (b): (i) the Subscription Rights are issued in connection with each holder's Noteholder Claims as of the Rights Offering Record Date; (ii) no transfer, assignment or other disposition of the Subscription Rights may be made except in connection with the transfer, assignment or disposition of the corresponding Notes; (iii) upon any valid exercise of Subscription Rights and payment of the applicable Subscription Payment Amount by any Rights Offering Purchaser, such Rights Offering Purchaser shall not thereafter transfer, assign or otherwise dispose of any corresponding Notes on or prior to the Effective Date or the right to receive Rights Offering Stock prior to the distribution of such Rights Offering Stock to the applicable Rights Offering Purchaser; (iv) no transfer, assignment or other disposition of the Subscription Rights of any Rights Offering Backstop Investor may be made unless such Rights Offering Backstop Investor's transferee agrees to an assignment or transfer of such Rights Offering Backstop Investor's commitment, as set forth in the Rights Offering Backstop Commitment Agreement, to subscribe for the Rights Offering Stock in connection with such transferred Subscription Rights; and (v) no assignment or transfer of a Rights Offering Backstop Investor's commitment, as set forth in the Rights Offering Backstop Commitment Agreement, may be made without the prior written consent of the Debtors unless such Rights Offering Backstop Investor's transferee is an affiliate of such Rights Offering Backstop Investor or is another Rights Offering Backstop Investor. Any transfer or detachment, or attempted transfer or detachment, in violation of this restriction will be null and void and the Debtors will not treat any purported transferee of the Subscription Rights separate from the Noteholder Claims as the holder of any Subscription Rights. Once a holder of a Noteholder Claim has exercised any of its Subscription Rights by properly executing and delivering a Subscription Form and causing the

tender of the corresponding Subscription Payment Amount to the Subscription Agent, such exercise may only be revoked, rescinded or annulled in the sole discretion of the Debtors or Reorganized Debtors.

(e) Distribution of Rights Offering Stock. On, or as soon as reasonably practicable after, the Effective Date, Reorganized RMC or another applicable Disbursing Agent shall distribute the Rights Offering Stock purchased by such Rights Offering Purchaser set forth in the Subscription Form or Rights Offering Backstop Investor to such Rights Offering Purchaser set forth in the Subscription Form or Rights Offering Backstop Investor. In the event the Debtors and the Required Consenting Noteholders determine that a Stockholders Agreement and/or Registration Rights Agreement will be executed and delivered in connection with the Plan, upon receipt of its Rights Offering Stock, each Rights Offering Purchaser that receives new Common Stock shall be deemed to have executed, as of the Effective Date, the Stockholders Agreement and/or Registration Rights Agreement, as applicable.

(f) Validity of Exercise of Subscription Rights. All questions concerning the timeliness, validity, form, and eligibility of any exercise, or purported exercise, of Subscription Rights shall be determined by the Debtors or Reorganized Debtors. The Debtors or Reorganized Debtors, in their reasonable discretion exercised in good faith, may waive any defect or irregularity, or permit a defect or irregularity to be corrected within such times as they may determine, or reject the purported exercise of any Subscription Rights. A Subscription Form shall be deemed not to have been received or accepted until all irregularities have been waived or cured within such time as the Debtors or Reorganized Debtors determine in their discretion reasonably exercised in good faith. The Debtors or Reorganized Debtors will use commercially reasonable efforts to give written notice to any Rights Offering Purchaser regarding any defect or irregularity in connection with any purported exercise of Subscription Rights by such Person and may permit such defect or irregularity to be cured within such time as they may determine in good faith to be appropriate; provided, however, that neither the Debtors and Reorganized Debtors nor any of their Related Persons shall incur any liability for giving, or failing to give, such notification and opportunity to cure.

(g) Rights Offering Proceeds. The proceeds of the Rights Offering will provide \$135 million in capital to the Reorganized Debtors, which shall be used to indefeasibly pay in cash in full all DIP Claims arising under the DIP Credit Agreement on the Effective Date, fund other payments required under this Plan including the Prepayment on the Effective Date, and for ordinary course operations and general corporate purposes of the Reorganized Debtors after the Effective Date.

(h) Exit Issuance Deposit. On the Effective Date, the DIP Agent and RM Funding Escrow LLC shall execute and deliver joint written instructions to The PrivateBank and Trust Company to release the Exit Issuance Deposit to RM Funding Escrow LLC for distribution by RM Funding Escrow LLC to the Consenting Noteholders that are members of RM Funding Escrow LLC.

(i) Deposit Fee. In consideration for the Exit Issuance Deposit, on the Effective Date, Reorganized RMC shall issue to the Consenting Noteholders that are members of RM Funding Escrow LLC their respective shares of the Exit Issuance Deposit Fee based on the

amount of the total Exit Issuance Deposit they funded.

(j) Commitment Fee. On the Effective Date, Reorganized RMC shall issue to the Consenting Noteholders that are parties to the Rights Offering Backstop Commitment Agreement their respective shares of the Exit Issuance Backstop Fee pursuant to the terms of the Rights Offering Commitment Agreement.

7.3. *Corporate Action.*

The Debtors shall continue to exist as the Reorganized Debtors on and after the Effective Date, with all of the powers of corporations, limited liability companies or limited partnerships, as the case may be, under applicable law. The certificates of incorporation or operating agreements, as applicable, of each Reorganized Debtor shall, *inter alia*, prohibit the issuance of nonvoting stock to the extent required by section 1123(a)(6) of the Bankruptcy Code. The adoption of any new or amended and restated operating agreements, certificates of incorporation and by-laws of each Reorganized Debtor and the other matters provided for under the Plan involving the corporate or entity structure of the Debtors or the Reorganized Debtors, as the case may be, or limited liability company or corporate action to be taken by or required of the Debtors or the Reorganized Debtors, as the case may be, shall be deemed to have occurred and be effective as provided herein and shall be authorized and approved in all respects, without any requirement of further action by members, stockholders or directors of the Debtors or the Reorganized Debtors, as the case may be, and shall not constitute a change of control of any Debtor for any purpose. Without limiting the foregoing, the Reorganized Debtors shall be authorized, without any further act or action required, to issue all New Common Stock and New Preferred Stock, and any instruments required to be issued hereunder, to undertake, consummate and execute and deliver any documents relating to the Restructuring Transaction and to undertake any action or execute and deliver any document contemplated under the Plan. The Confirmation Order shall provide that it establishes conclusive corporate or other authority, and evidence of such corporate or other authority, required for each of the Debtors and the Reorganized Debtors to undertake any and all acts and actions required to implement or contemplated by the Plan, including the specific acts or actions or documents or instruments identified in this Article VII, and no board, member or shareholder vote shall be required with respect thereto. Without limiting the foregoing, the Reorganized Debtors may pay the charges that they incur on or after the Effective Date for professionals' fees, disbursements, expenses or related support services without application to the Bankruptcy Court.

7.4. *Effectuating Documents and Further Transactions.*

The Debtors and the Reorganized Debtors shall be authorized to execute, deliver, file, or record such documents, contracts, instruments, and other agreements and take such other action as may be necessary to effectuate and further evidence the terms and conditions of the Plan, so long as such documents, contracts, instruments and other agreements are consistent with the Plan.

7.5. *Cancellation of Existing Securities and Agreements.*

Except for the purpose of evidencing a right to distribution under this Plan, and except as otherwise set forth herein, including in Section 12.3 of this Plan, on the Effective Date all agreements, instruments, and other documents evidencing any Claim or any Existing Common Stock Interest, other than Intercompany Interests, and any rights of any holder in respect thereof, shall be deemed cancelled, discharged and of no force or effect.

7.6. *Intercompany Interests.*

No Intercompany Interests shall be cancelled pursuant to this Plan, and all Intercompany Interests shall continue in place following the Effective Date, solely for the purpose of maintaining the existing corporate structure of the Debtors and the Reorganized Debtors.

7.7. *Cancellation of Certain Existing Security Interests.*

Upon the full payment or other satisfaction of an Allowed Other Secured Claim, or promptly thereafter, the holder of such Allowed Other Secured Claim shall deliver to the Debtors or Reorganized Debtors (as applicable) any termination statements, instruments of satisfactions, or releases of all security interests with respect to its Allowed Other Secured Claim that may be reasonably required in order to terminate any related financing statements, mortgages, mechanic's liens, or *lis pendens*.

7.8. *Officers and Boards of Directors.*

(a) The existing boards of directors of the Debtors shall be deemed to have resigned on and as of the Effective Date. On the Effective Date, the boards of directors of the Reorganized Debtors shall consist of those individuals that will be identified on Exhibit K hereto and filed as part of the Plan Supplement. The members of the board of directors of each Debtor prior to the Effective Date, in their capacities as such, shall have no continuing obligations to the Reorganized Debtors on or after the Effective Date. Following the occurrence of the Effective Date, the board of directors of each Reorganized Debtor may be replaced by such individuals as are selected in accordance with the organizational documents of such Reorganized Debtor.

(b) On the Effective Date, the officers of the Reorganized Debtors shall consist of those individuals identified on Exhibit L hereto and filed as part of the Plan Supplement.

7.9. *Management Agreements and Management Equity Plan.*

(a) As soon as reasonably practicable after the Effective Date, Reorganized RMC and certain of the Reorganized Debtors shall execute the Management Agreements.

(b) As soon as reasonably practicable after the Effective Date, the board of directors of Reorganized RMC shall adopt the Management Equity Plan.

7.10. *Authorization, Issuance and Delivery of New Common Stock and New Preferred Stock.*

(a) On the Effective Date, Reorganized RMC is authorized to issue or cause to be issued the New Common Stock and New Preferred Stock in accordance with the terms of this Plan and the Amended Certificate, without the need for any further corporate or shareholder action.

(b) On the Effective Date, Reorganized RMC shall issue and cause to be delivered the New Common Stock and New Preferred Stock at the direction of the applicable Disbursing Agent for distribution in accordance with the terms of the Plan.

(c) In the event the Debtors and the Required Consenting Noteholders determine that a Stockholders Agreement and/or Registration Rights Agreement will be executed and delivered in connection with the Plan, upon receipt of its Pro Rata Share of the New Common Stock under the Plan, each holder of an Allowed Unsecured Claim that receives New Common Stock shall be deemed to have executed, as of the Effective Date, the Stockholders Agreement and/or Registration Rights Agreement.

(d) In the event the Debtors and the Required Consenting Noteholders determine that a Stockholders Agreement and/or Registration Rights Agreement will be executed and delivered in connection with the Plan, upon receipt of its portion of the New Common Stock issued pursuant to the Rights Offering (including any New Common Stock issued pursuant to the Rights Offering Backstop Commitment Agreement), each Rights Offering Purchaser shall be deemed to have executed, as of the Effective Date, the Stockholders Agreement and/or Registration Rights Agreement.

7.11. *Exemption from Securities Laws.*

The issuance of New Common Stock and New Preferred Stock pursuant to the Plan (including the Rights Offering Stock and the New Common Stock issued under the Management Equity Plan) shall be exempt from any securities laws registration requirements to the fullest extent permitted by section 1145 of the Bankruptcy Code.

7.12. *Amended and Restated Secured Credit Agreement and Exit LC Facility.*

On the Effective Date, without any requirement of further action by security holders or directors of the Debtors, each of the Reorganized Debtors shall be authorized to enter into the Amended and Restated Secured Credit Agreement and the Exit LC Facility, as well as any notes, documents or agreements required thereunder, including any documents required in connection with the creation or perfection of the liens on collateral securing the obligations arising under the Amended and Restated Secured Credit Agreement and the Exit LC Facility.

7.13. *Exemption from Certain Transfer Taxes.*

To the fullest extent permitted by applicable law, all sale transactions consummated by the Debtors and approved by the Bankruptcy Court on and after the Confirmation Date through and including the Effective Date, including the transfers effectuated

under the Plan, the sale by the Debtors of any owned property pursuant to section 363(b) or 1123(b)(4) of the Bankruptcy Code, any assumption, assignment, and/or sale by the Debtors of their interests in unexpired leases of non-residential real property or executory contracts pursuant to section 365(a) of the Bankruptcy Code, and the creation, modification, consolidation or recording of any mortgage pursuant to the terms of the Plan, the Amended and Restated Secured Credit Agreement or ancillary documents, shall constitute a “transfer under a plan” within the purview of section 1146 of the Bankruptcy Code, and shall not be subject to any stamp, real estate transfer, mortgage recording, or other similar tax.

7.14. *Insurance Preservation and Proceeds.*

Nothing in the Plan, including any releases, shall diminish or impair the enforceability of any policies of insurance that cover claims against the Debtors, the Reorganized Debtors or any other Person, and all such policies shall vest in the Reorganized Debtors as of and subject to the occurrence of the Effective Date. For the avoidance of doubt, except as set forth in Section 10.6 of the Plan, to the extent such policies of insurance are executory contracts subject to assumption pursuant to section 365 of the Bankruptcy Code, such policies of insurance shall not be deemed assumed by the Reorganized Debtors, and (i) the self-insured portion of Claims arising under any insurance policies held by the Debtors prior to the Commencement Date shall, as to the Debtors, be treated as Other Unsecured Claims and (ii) neither the Debtors nor the Reorganized Debtors shall be obligated to pay any deductibles or self-insured retentions or take other actions with respect thereto. The Reorganized Debtors shall continue to perform under their insurance policies in the ordinary course of business with respect to any Claims arising following the Commencement Date. For the avoidance of doubt, this Section 7.14 shall not apply in any way to the ACE Insurance Program.

7.15. *Solicitation of Debtors.*

Notwithstanding anything to the contrary herein, each Debtor that would otherwise be entitled to vote to accept or reject this Plan as a holder of a Claim against or Interest in another Debtor shall not be solicited for voting purposes, and such Debtor will be deemed to have voted to accept this Plan.

7.16. *The Litigation Trust.*

(a) On the Effective Date, the Debtors, the Reorganized Debtors, and/or Reorganized RMC, as the case may be, on their own behalf and on behalf of the Litigation Trust Beneficiaries shall execute the Litigation Trust Agreement and shall take all other steps necessary to establish the Litigation Trust in accordance with and pursuant to the terms of the Litigation Trust Agreement, including, without limitation, entry into and execution of the Cooperation Agreement. The Litigation Trustee shall serve in accordance with the Litigation Trust Agreement without bond or similar instrument. The Debtors, the Reorganized Debtors, and/or Reorganized RMC, as the case may be, shall transfer the Litigation Trust Assets to the Litigation Trust. Such transfer shall be exempt from any stamp, real estate transfer, mortgage reporting, sales, use or other similar tax. The Debtors, the Reorganized Debtors and Reorganized RMC shall have no liability with respect to the distribution of any proceeds of the Litigation Trust Claims to the Litigation Trust Beneficiaries, except as expressly set forth in Section 8.16 of

this Plan with respect to an Employment Claim. Any recoveries on account of the Litigation Trust Claims shall be distributed to holders of the Litigation Trust Interests in accordance with the Plan and the Litigation Trust Agreement.

(b) In connection with the transfer of the Litigation Trust Claims, any attorney-client privilege, work-product privilege or other privilege or immunity attaching to any documents or communications (whether written or oral) shall be transferred to the Litigation Trust and shall vest in the Litigation Trustee and its representatives. The Debtors, the Reorganized Debtors and/or Reorganized RMC, as the case may be, and the Litigation Trustee are authorized to take all necessary actions to effectuate the transfer of such privileges. The Confirmation Order shall provide that the Litigation Trustee's receipt of transferred privileges shall be without waiver in recognition of the joint and/or successorship interest in prosecuting claims on behalf of the Debtors' Estates.

(c) The transfer of the Litigation Trust Assets to the Litigation Trust shall be made, as provided herein, for the benefit of the Litigation Trust Beneficiaries. Upon the transfer of the Litigation Trust Assets, the Debtors, the Reorganized Debtors and/or Reorganized RMC, as the case may be, shall have no interest in or with respect to the Litigation Trust Assets or the Litigation Trust. To the extent that any Litigation Trust Assets cannot be transferred to the Litigation Trust because of a restriction on transferability under applicable non-bankruptcy law that is not superseded or preempted by section 1123 of the Bankruptcy Code or any other provision of the Bankruptcy Code, such Litigation Trust Assets shall be deemed to have been retained by Reorganized RMC and the Litigation Trustee shall be deemed to have been designated as a representative of Reorganized RMC pursuant to section 1123(b)(3)(B) of the Bankruptcy Code to enforce and pursue such Litigation Trust Assets on behalf of Reorganized RMC. Notwithstanding the foregoing, all net proceeds of such Litigation Trust Assets shall be transferred to the Litigation Trust to be distributed to the Litigation Trust Beneficiaries consistent with the terms of the Plan and the Litigation Trust Agreement. For the avoidance of doubt, net proceeds of Estate Accounting-Related Causes of Action shall be shared on a pro rata basis among the Litigation Trust Beneficiaries.

(d) The Litigation Trust shall be established for the sole purpose of liquidating the Litigation Trust Assets, in accordance with Treasury Regulation Section 301.7701-4(d), with no objective to continue or engage in the conduct of a trade or business.

(e) The Litigation Trustee may establish a reserve on account of Claims that are Disputed. The Litigation Trustee may, for U.S. federal income tax purposes (and, to the extent permitted by law, for state and local income tax purposes), (i) make an election pursuant to Treasury Regulation section 1.468B-9 to treat such reserve as a "disputed ownership fund" within the meaning of that section, (ii) allocate taxable income or loss to such reserve, with respect to any given taxable year (but only for the portion of the taxable year with respect to which such Claims are Disputed), and (iii) distribute assets from the reserve as, when, and to the extent, such Claims that are Disputed cease to be Disputed, whether by virtue of becoming Allowed or otherwise resolved. The Litigation Trust Beneficiaries shall be bound by such election, if made by the Litigation Trustee, and as such shall, for U.S. federal income tax purposes (and, to the extent permitted by law, for state and local income tax purposes), report consistently therewith.

(f) The Litigation Trust shall be dissolved no later than five (5) years from the Effective Date, unless the Bankruptcy Court, upon motion made within the six (6) month period prior to such fifth (5th) anniversary (and, in the event of further extension, at least six (6) months prior to the end of the preceding extension), determines that a fixed period extension (not to exceed three (3) years, together with any prior extensions, without a favorable letter ruling from the IRS that any further extension would not adversely affect the status of the Litigation Trust as a liquidating trust for federal income tax purposes) is necessary to facilitate or complete the recovery on and liquidation of the Litigation Trust Assets.

(g) To the extent the interests in the Litigation Trust are deemed to be “securities,” the issuance of such interests under the Plan are exempt, pursuant to section 1145 of the Bankruptcy Code, from registration under the Securities Act of 1933, as amended, and any applicable state and local laws requiring registration of securities.

7.17. The Creditor Representative Fund.

On the Effective Date, the Debtors, the Reorganized Debtors, and/or Reorganized RMC, as the case may be, shall transfer the Creditor Representative Assets to the Creditor Representative Fund, which shall be a fund administered by the Creditor Representative for purposes of (i) participating in the Claims resolution process and (ii) liquidating the Litigation Trust Assets, including, without limitation, funding the administrative and professional costs incurred by the Litigation Trust. Such transfer shall be exempt from any stamp, real estate transfer, mortgage reporting, sales, use or other similar tax. The Debtors, the Reorganized Debtors and Reorganized RMC shall have no liability with respect to the distribution of any proceeds from the Creditor Representative Fund. The Creditor Representative and the Creditor Representative Fund shall be governed by the terms of this Plan and the Creditor Representative Plan Supplement.

7.18. No Consent to Change of Control Required.

Notwithstanding anything to the contrary herein, none of (a) the facts or circumstances giving rise to the commencement of, or occurring in connection with, the Reorganization Cases, (b) the issuance of the New Common Stock or New Preferred Stock pursuant to the Plan, or (c) implementation or consummation of any other transaction pursuant to the Plan shall constitute a “change in ownership” or “change of control” (or a change in working control) of, or in connection with, any Debtor or Reorganized Debtor requiring the consent of any Person other than the Debtors or the Bankruptcy Court, including in connection with any local municipal licensing arrangement or under any executory contract or other agreement (whether entered into before or after the Commencement Date) between any Debtor and any third party, or any law (including the common law), statute, rule or any other regulation otherwise applicable to any Debtor.

ARTICLE VIII.

DISTRIBUTIONS

8.1. *Distributions.*

The Disbursing Agent shall make all Plan Distributions to the appropriate holders of Allowed Claims, free and clear of all liens, claims and encumbrances; provided, however, that (i) all Plan Consideration distributable to the Secured Lenders on account of the Allowed Secured Lender Claims shall be made to the Secured Credit Agreement Administrative Agent for further distribution to the Secured Lenders; and (ii) any distributions of Plan Consideration in respect of which the Notes Trustee is the Disbursing Agent which consist of physical certificates and/or is distributable to holders of Allowed Noteholder Claims other than Depository Trust Company Participants, shall be made by the Reorganized Debtors in accordance with information provided by the Disbursing Agent.

8.2. *Delivery of Distributions on Account of DIP Claims.*

Distributions on account of DIP Claims (to the extent not previously paid) shall be made on the Effective Date by the Reorganized Debtors or the Debtors, as applicable, to the DIP Agent. The DIP Agent shall act as the Disbursing Agent and distribute the relevant Plan Distributions to holders of Allowed DIP Claims, pursuant to the terms of the Plan.

8.3. *Distributions on Account of Allowed Claims Only.*

Notwithstanding anything herein to the contrary, no Plan Distribution shall be made on account of a Claim until such Claim becomes an Allowed Claim. Further notwithstanding anything to the contrary, no Plan Distribution shall be made on account of a Claim, even if such Claim becomes an Allowed Claim, to the extent a Litigation Trust Claim, Estate Accounting-Related Cause of Action, or Business Cause of Action is being pursued against the holder of such Claim or Allowed Claim and has not been finally disposed.

8.4. *No Postpetition Interest on Claims.*

Unless otherwise specifically provided for in the Confirmation Order or the DIP Order, or required by applicable bankruptcy law, postpetition interest shall not accrue or be paid on any Claims, and no holder of a Claim shall be entitled to interest accruing on such Claim on or after the Commencement Date.

8.5. *Date of Distributions.*

Unless otherwise provided herein, any distributions and deliveries to be made hereunder shall be made on the later of (i) the Effective Date and (ii) the first Business Day after the date a Claim becomes an Allowed Claim, or as soon thereafter as is reasonably practicable (but no later than thirty (30) days after the date such Claim becomes an Allowed Claim). In the event that any payment or act under this Plan is required to be made or performed on a date that is not a Business Day, then the making of such payment or the performance of such act may be

completed on, or as soon as reasonably practicable after the next succeeding Business Day, but shall be deemed to have been completed as of the required date.

8.6. *Distribution Record Date.*

As of the close of business on the applicable Distribution Record Date, the various lists of holders of Claims in each of the Classes, as maintained by the Debtors, the Administrative Agents, the Notes Trustee or their respective agents, shall be deemed closed and there shall be no further changes in the record holders of any of the Claims. The Debtors shall have no obligation to recognize any transfer of Claims occurring after the close of business on the applicable Distribution Record Date. Additionally, with respect to payment of any Cure Amounts or any Cure Disputes in connection with the assumption and/or assignment of the Debtors' executory contracts and unexpired leases, the Debtors shall have no obligation to recognize or deal with any party other than the non-Debtor party to the underlying executory contract or unexpired lease, even if such non-Debtor party has sold, assigned or otherwise transferred its Claim for a Cure Amount.

8.7. *No Recourse.*

No holder of any Claim shall have recourse to the Reorganized Debtors (or any property thereof), other than with regard to Plan Distributions and the enforcement of rights under the Plan.

8.8. *Method of Cash Distributions.*

Any Cash payment to be made pursuant to the Plan will be in U.S. dollars and may be made by draft, check, or wire transfer, in the sole discretion of the Debtors or the Reorganized Debtors, or as otherwise required or provided in any relevant agreement or applicable law.

8.9. *Fractional Shares.*

No fractional shares of New Common Stock shall be distributed. When any distribution would otherwise result in the issuance of a number of shares of New Common Stock that is not a whole number, the shares of the New Common Stock subject to such distribution will be rounded to the next higher or lower whole number as follows: (a) fractions equal to or greater than $\frac{1}{2}$ will be rounded to the next higher whole number; and (b) fractions less than $\frac{1}{2}$ will be rounded to the next lower whole number. The total number of shares of New Common Stock to be distributed on account of Allowed Claims will be adjusted as necessary to account for the rounding provided for in the Plan. No consideration will be provided in lieu of fractional shares that are rounded down.

8.10. *No Distribution in Excess of Allowed Amount of Claim.*

Notwithstanding anything to the contrary herein, no holder of an Allowed Claim shall receive in respect of such Claim any Plan Distribution in excess of the Allowed amount of such Claim.

8.11. *Disputed Payments.*

If any dispute arises as to the proper disbursement of Plan Consideration, including the identity of a holder of an Allowed Claim who is to receive any Plan Distribution, the Reorganized Debtors may, in lieu of making such Plan Distribution, make such Plan Distribution into a segregated account until the disposition thereof shall be determined by Bankruptcy Court order or by written agreement among the interested parties.

8.12. *Setoffs and Recoupments.*

Each Reorganized Debtor, or such entity's designee as instructed by such Reorganized Debtor, after consultation with the Creditor Representative, may, pursuant to section 553 of the Bankruptcy Code or applicable non-bankruptcy law, set off and/or recoup against any Allowed Claim, and the Plan Distributions to be made pursuant to the Plan on account of such Allowed Claim, any and all claims, rights and causes of action that a Reorganized Debtor or its successors may hold against and have been asserted in writing against the holder of such Allowed Claim after the Effective Date, provided that any setoff or recoupment against Plan Distributions must be asserted in writing by the Reorganized Debtors prior to the date such Plan Distributions become payable pursuant to the terms of the Plan. In the absence of a written objection by such holder of an Allowed Claim within fifteen (15) days of the delivery of such a writing from a Reorganized Debtor or its successors, it shall be conclusively presumed that the requirements for disallowance of a Claim under section 502(d) of the Bankruptcy Code or setoff or recoupment under applicable law have been satisfied. If the holder of such Allowed Claim timely responds to the Reorganized Debtors' written assertion that setoff or recoupment against such holder is not appropriate, the party asserting such right must seek an order of the Bankruptcy Court allowing such setoff or recoupment; provided, however, that neither the failure to effect a setoff or recoupment nor the allowance of any Claim hereunder will constitute a waiver or release by a Reorganized Debtor or its successor of any and all claims, rights, defenses and causes of action that a Reorganized Debtor or its successor may possess against such holder.

8.13. *Delivery of Distributions.*

Unless otherwise provided for under the Plan (including Section 8.1(b) herein), on, or as promptly as reasonably practicable after, the Effective Date, the Disbursing Agent will issue, or cause to be issued, and authenticate, as applicable, the applicable Plan Consideration, and, except as otherwise provided in this Article VIII (including Section 8.1(b) herein), make all distributions or payments to any holder of an Allowed Claim to the relevant Distribution Address.

8.14. *Unclaimed Property.*

The Reorganized Debtors or applicable Disbursing Agent shall hold all Unclaimed Property (and all interest, dividends, and other distributions thereon), for the benefit of the holders of Claims entitled thereto under the terms of the Plan; provided, however, that any Unclaimed Property consisting of New Common Stock in respect of which the Notes Trustee is the Disbursing Agent shall be held by the Reorganized Debtors. If a holder of an Allowed Claim

notifies the Reorganized Debtors or applicable Disbursing Agent, in accordance with Section 13.17 of the Plan, of such holder's then-current address, such holder shall be entitled to all Plan Distributions owed to such holder of an Allowed Claim (and all interest, dividends, and other distribution thereon accrued during the time such Plan Consideration was Unclaimed Property). At the end of one (1) year following the later of (a) the Effective Date, and (b) the date a Claim is first Allowed, the holders of Allowed Claims theretofore entitled to Unclaimed Property held pursuant to this section shall be deemed to have forfeited such property, whereupon all right, title and interest in and to such property shall immediately and irrevocably revert in the Reorganized Debtors, such holders shall cease to be entitled thereto and: (a) any such Unclaimed Property that is Cash (including Cash interest, maturities, dividends and the like) shall be property of the Reorganized Debtors free of any restrictions thereon; and (b) any New Common Stock or New Preferred Stock that is Unclaimed Property shall be cancelled. The Reorganized Debtors or the applicable Disbursing Agent shall have no obligation to attempt to locate any holder of an Allowed Claim other than by reviewing the Debtors' books and records, proofs of Claim filed against the Debtors, or relevant registers maintained for such Claims; rather, such Unclaimed Property shall be reallocated to other creditors holding Allowed Other Unsecured Claims that do not elect to receive New Common Stock pursuant to Section 5.5(a)(i) of this Plan.

8.15. *Distribution Minimum.*

Neither the Reorganized Debtors, nor any applicable Disbursing Agent, shall have any obligation to make a distribution that is less than one (1) share of New Common Stock, one (1) share of New Preferred Stock, or \$20.00 in Cash, as may be applicable. For the avoidance of doubt, if the distributions payable or that become payable to a holder of an Allowed Claim are, in the aggregate, \$20.00 or more in Cash, the Reorganized Debtors or the applicable Disbursing Agent shall be obligated to make the distribution to such holder on the first Monthly Distribution Date after such holder becomes entitled to the aggregate distribution of \$20.00 or more in Cash.

8.16. *Withholding Taxes.*

Any federal or state withholding taxes or other amounts required to be withheld under any applicable law shall be deducted and withheld from any Plan Distributions. All Persons holding Claims shall be required to provide any information necessary to effect the withholding of such taxes. Notwithstanding any other provision of this Plan, except as set forth in this Section 8.16, (a) each holder of an Allowed Claim that is to receive a distribution under this Plan shall have sole and exclusive responsibility for the satisfaction and payment of any tax obligations imposed by any governmental unit, including income, withholding and other tax obligations on account of such distribution, and (b) no Plan Distributions shall be required to be made to or on behalf of such holder pursuant to this Plan unless and until such holder has made arrangements satisfactory to the Reorganized Debtors for the payment and satisfaction of such tax obligations or has, to the Reorganized Debtors' satisfaction, established an exemption therefrom. Notwithstanding the foregoing, the Reorganized Debtors shall be solely responsible for the employer portion of all taxes and like obligations (including, without limitation, social security, Medicare, unemployment, and disability) payable to a governmental authority that are required to be paid with respect to the holder of an Allowed Claim to the extent such Allowed Claim arises from wages or other remuneration in connection with the performance of services as an employee of the Debtors for any period prior to the Effective Date (an "**Employment**

Claim”); for the avoidance of doubt, the obligations of the Reorganized Debtors hereunder shall apply equally to all payments made in respect of an Employment Claim, whether made in Cash or in property under the Plan, and including a payment in respect of an Employment Claim made from the Litigation Trust. The Reorganized Debtors and the Litigation Trustee further agree to cooperate, each at their own expense, with all reasonable requests for assistance and information, including the mechanics of remitting and reporting on a timely basis, with respect to each Employment Claim.

8.17. *Rights and Powers of Disbursing Agent.*

(a) **Powers of the Disbursing Agent.** The Disbursing Agent shall be empowered to (i) effect all actions and execute all agreements, instruments, and other documents necessary to perform its duties under this Plan, (ii) make all Plan Distributions or payments contemplated hereby, (iii) employ professionals to represent it with respect to its responsibilities, and (iv) exercise such other powers as may be vested in the Disbursing Agent by order of the Bankruptcy Court (including any order issued after the Effective Date), pursuant to this Plan, or as deemed by the Disbursing Agent to be necessary and proper to implement the provisions hereof.

(b) **Expenses Incurred On or After the Effective Date.** Except as otherwise ordered by the Bankruptcy Court, and subject to the written agreement of the Reorganized Debtors, the amount of any reasonable fees and expenses incurred by the Disbursing Agent on or after the Effective Date (including taxes) and any reasonable compensation and expense reimbursement claims (including reasonable attorney and other professional fees and expenses) made by the Disbursing Agent shall be paid in Cash by the Reorganized Debtors.

ARTICLE IX.

PROCEDURES FOR RESOLVING CLAIMS

9.1. *Objections to and Resolution of Claims.*

The Reorganized Debtors, in consultation with the Creditor Representative as set forth herein, shall be entitled to make and to file objections to, otherwise contest the allowance of, or otherwise settle or compromise Claims (other than Allowed Claims). Any objections to, or other proceedings concerning the allowance of, Claims (other than Rejection Damages Claims, Fee Claims and Administrative Expense Claims) that have been filed on or before the Confirmation Date, shall be filed and served upon the holders of the Claims as to which the objection is made, or otherwise commenced, as the case may be, as soon as reasonably practicable, but in no event later than the Claims Objection Deadline (as may be extended by the Bankruptcy Court upon a motion of the Reorganized Debtors). Objections to, or other proceedings contesting the allowance of, Claims (other than Fee Claims) may be litigated to judgment, settled or withdrawn by the Reorganized Debtors, in consultation with the Creditor Representative. The Reorganized Debtors, in consultation with the Creditor Representative, may settle any such objections or proceedings or otherwise settle or compromise Claims without Bankruptcy Court approval or may seek Bankruptcy Court approval without notice to any Person, except as set forth herein.

Any Claims filed after the Bar Date or Administrative Bar Date, as applicable, shall be deemed Disallowed and expunged in their entirety without further order of the Bankruptcy Court or any action being required on the part of the Debtors or the Reorganized Debtors, unless the Person or entity wishing to file such untimely Claim has received prior Bankruptcy Court authorization to do so. In the event any proof of such untimely Claim is so permitted by the Bankruptcy Court, the Reorganized Debtors, in consultation with the Creditor Representative, shall have until the later of thirty (30) days from the date of such Bankruptcy Court authorization or the Claims Objection Deadline (as may be extended by the Bankruptcy Court upon a motion of the Reorganized Debtors) to object to such Claim.

An objection to a Claim shall be deemed properly served on the claimant if the objecting party effects service in any of the following manners: (a) in accordance with Rule 4 of the Federal Rules of Civil Procedure, as modified and made applicable by Bankruptcy Rule 7004; (b) by first class mail, postage prepaid, on the signatory on the proof of claim as well as all other representatives identified in the proof of claim or any attachment thereto; or (c) by first class mail, postage prepaid, on any counsel that has appeared on the claimant's behalf in the Reorganization Cases (so long as such appearance has not been subsequently withdrawn).

The Reorganized Debtors shall be responsible for (and shall bear the sole expense of) identifying and objecting to Other Unsecured Claims that are inconsistent with the Debtors' books and records or otherwise objectionable, and shall carry out this role in good faith and in a manner consistent with its obligations to their Estates and creditors of the Estates. The Creditor Representative shall have oversight, consultation, and objection rights in connection with the Claims resolution process. If the Creditor Representative objects to a proposed compromise, settlement, resolution or withdrawal of an objection by the Reorganized Debtors with respect to an Other Unsecured Claim, it may give notice of such objection and a hearing shall be scheduled before the Bankruptcy Court to resolve the objection. Notwithstanding the foregoing, solely with respect to any asserted indemnity claims of professionals or advisors that may be asserted against the Debtors related to the acquisition of the Debtors in June, 2011 by affiliates of Warburg Pincus, LLC, any asserted severance-related claims of Michael P. DiMino or Christopher E. Kevane, any asserted claims relating to the certified class action entitled *Bowers Companies Wage and Hour Case*, and any other asserted claims that the Reorganized Debtors may seek to resolve in a manner that would give the claimant an Allowed Other Unsecured Claim in an amount of \$1,750,000 or greater, the Reorganized Debtors shall not seek to resolve such claims without the affirmative written consent of the Creditor Representative, which consent shall not be unreasonably withheld.

9.2. *Disputed Claims.*

(a) No Distributions or Payments Pending Allowance.

Except as provided in this Section 9.2, Disputed Claims shall not be entitled to any Plan Distributions, unless and until such Claims become Allowed Claims.

(b) Establishment of Disputed Claims Reserve. On the Effective Date or as soon thereafter as is reasonably practicable, the Reorganized Debtors shall set aside and reserve, for the benefit of each holder of a Disputed Claim, Cash or New Common Stock in an amount

equal to the Plan Distribution to which the holder of such Disputed Claim would be entitled if such Disputed Claim were an Allowed Claim in an amount equal to (i) the amount of such Claim as estimated by the Bankruptcy Court pursuant to an Estimation Order, (ii) if no Estimation Order has been entered with respect to such Claim, the amount in which such Disputed Claim is proposed to be allowed in any pending Claims objection, or (iii) if no Estimation Order has been entered with respect to such Claim, and no objection to such Claim is pending on the Effective Date, (A) the amount listed in the Debtors' schedules of assets and liabilities filed in the Reorganization Cases or (B) if a timely filed proof of claim or application for payment has been filed with the Bankruptcy Court or Claims Agent, as applicable, the amount set forth in such timely filed proof of claim or application for payment. In addition, the Reorganized Debtors shall set aside and reserve, for the benefit of each holder of a Rejection Damages Claim for which the deadline to file and serve a proof of claim evidencing such Rejection Damages Claim (pursuant to Section 10.2 hereof) occurs after the Effective Date, an amount equal to the Debtors' good faith estimate of the Plan Distribution to which the holder of such Rejection Damages Claim would be entitled if such Rejection Damages Claim were to become an Allowed Claim. Such reserved amounts, collectively, shall constitute the "**Disputed Claims Reserve**." For the avoidance of doubt, the Debtors or the Reorganized Debtors, as applicable, shall not be required to reserve any Cash or other consideration on account of any Disputed Claim the Debtors or the Reorganized Debtors, as applicable, reasonably believe is covered by insurance. Notwithstanding anything in this Section 9.2 to the contrary, with respect to holders of Disputed Claims that may be entitled to a distribution of Other Unsecured Cash, on the Effective Date, the Reorganized Debtors shall set aside the maximum potential amount of the Other Unsecured Cash (*i.e.*, \$5 million) in a segregated account held in trust for the benefit of Allowed Other Unsecured Claims that elect to receive Other Unsecured Cash, which shall be free and clear of any and all liens, claims, pledges, charges, or encumbrances, including any liens securing the exit facilities, and not subject in any way to attachment, seizure or setoff; provided, however, to the extent and at such time as Allowed Other Unsecured Claims that elected to receive Other Unsecured Cash, plus non-contingent, contingent, and/or liquidated Disputed Other Unsecured Claims (including any liquidated portions of unliquidated Disputed Other Unsecured Claims as may be reasonably determined by the Reorganized Debtors, in consultation with the Creditor Representative, in accordance with the Claims resolution process set forth in the Plan) that elected to receive Other Unsecured Cash, is less than \$40 million, then, at such time (which time shall be no earlier than 185 days after the Commencement Date), any amount in the segregated account reserved to make payments on account of Allowed Other Unsecured Claims in excess of Other Unsecured Cash shall become the sole and exclusive property of the Reorganized Debtors.

(c) Plan Distributions to Holders of Subsequently Allowed Claims.

On the first Business Day after the date a Disputed Claim becomes an Allowed Claim, or as soon thereafter as is reasonably practicable (but no later than thirty (30) days after the date such Disputed Claim becomes an Allowed Claim), subject to Section 9.2 of this Plan, the Disbursing Agent will make distributions or payments on account of any such Disputed Claim that has become an Allowed Claim. The Disbursing Agent shall distribute in respect of such newly Allowed Claims the Plan Consideration as to which such Claims would have been entitled under this Plan if such newly Allowed Claims were fully or partially Allowed, as the case may be, on the Effective Date, plus any dividends distributed thereon between the Effective Date and the date such Disputed Claim became an Allowed Claim, less direct and actual

expenses, fees or other direct costs incurred by the Debtors, the Reorganized Debtors or the Creditor Representative resolving such Disputed Claims.

(d) Distribution of the Disputed Claims Reserve Upon Disallowance.

To the extent any Disputed Claim has become Disallowed in full or in part (in accordance with the procedures set forth in the Plan), any Plan Consideration held by the Reorganized Debtors on account of, or to pay, such Disputed Claim shall become the sole and exclusive property of the Reorganized Debtors. Notwithstanding the foregoing, if Other Unsecured Cash equals either (i) Cash in the amount of \$4.0 million (if the ultimate aggregate amount of Allowed Other Unsecured Claims that elect to receive Other Unsecured Cash is less than \$32 million), or (ii) Cash in the amount of \$5.0 million (if the ultimate aggregate amount of Allowed Other Unsecured Claims that elect to receive Other Unsecured Cash is greater than \$40 million), Other Unsecured Cash that is Plan Consideration held by the Reorganized Debtors, in accordance with the provisions in the Plan, on account of, or to pay, a Disputed Claim that has become Disallowed, shall not become the property of the Reorganized Debtors; rather, such Other Unsecured Cash shall be reallocated to other creditors holding Allowed Other Unsecured Claims that do not elect to receive New Common Stock pursuant to section 5.5(a)(i) of this Plan; provided, however, to the extent and at such time as Allowed Other Unsecured Claims that elected to receive Other Unsecured Cash, plus non-contingent, contingent, and/or liquidated Disputed Other Unsecured Claims (including any liquidated portions of unliquidated Disputed Other Unsecured Claims as may be reasonably determined by the Reorganized Debtors, in consultation with the Creditor Representative, in accordance with the Claims resolution process set forth in the Plan) that elected to receive Other Unsecured Cash, is less than \$40 million, then, at such time, any amount in the segregated account reserved to make payments on account of Allowed Other Unsecured Claims in excess of Other Unsecured Cash shall become the sole and exclusive property of the Reorganized Debtors.

9.3. *Estimation of Claims.*

Any Debtor, Reorganized Debtor, in consultation with the Creditor Representative, or holder of a Claim may request that the Bankruptcy Court estimate Claims pursuant to section 502(c) of the Bankruptcy Code for purposes of determining the Allowed amount of such Claim regardless of whether any Person has previously objected to such Claim or whether the Bankruptcy Court has ruled on any such objection, and the Bankruptcy Court shall retain jurisdiction to estimate Claims for purposes of determining the Allowed amount of such Claims at any time. In the event that the Bankruptcy Court estimates any contingent or unliquidated Claim for allowance purposes, that estimated amount will constitute either the Allowed amount of such Claim or a maximum limitation on such Claim, as determined by the Bankruptcy Court. If the estimated amount constitutes a maximum limitation on such Claim, the Debtors or the Reorganized Debtors, in consultation with the Creditor Representative, may elect to pursue any supplemental proceedings to object to any ultimate payment on such Claim. All of the objection, estimation, settlement, and resolution procedures set forth in the Plan are cumulative and not exclusive of one another.

9.4. *Expenses Incurred On or After the Effective Date.*

Except as otherwise ordered by the Bankruptcy Court, and subject to the written agreement of the Reorganized Debtors, the amount of any reasonable, actual fees and expenses incurred by any Professional Person or the Claims Agent in connection with implementation of this Plan after the Effective Date, including reconciliation of, objection to, and settlement of Claims, shall be paid in Cash by the Reorganized Debtors.

ARTICLE X.

EXECUTORY CONTRACTS, UNEXPIRED LEASES AND PENSION PLAN

10.1. *General Treatment.*

As of and subject to the occurrence of the Effective Date and the payment of the applicable Cure Amount, all executory contracts and unexpired leases to which any Debtor is a party shall be deemed assumed, except for any executory contracts or unexpired leases that: (a) previously have been assumed or rejected pursuant to a Final Order of the Bankruptcy Court; (b) are designated specifically as an executory contract or unexpired lease to be rejected on the Schedule of Rejected Contracts and Leases, if any; or (c) are the subject of a separate motion to assume or reject under section 365 of the Bankruptcy Code pending on the Effective Date. As of and subject to the occurrence of the Effective Date, all contracts identified on the Schedule of Rejected Contracts and Leases shall be deemed rejected. Subject to the occurrence of the Effective Date, entry of the Confirmation Order by the Bankruptcy Court shall constitute approval of such assumptions and rejections pursuant to sections 365(a) and 1123 of the Bankruptcy Code. Each executory contract and unexpired lease assumed pursuant to this Section 10.1 shall revest in and be fully enforceable by the applicable Reorganized Debtor in accordance with its terms, except as modified by the provisions of the Plan, or any order of the Bankruptcy Court authorizing and providing for its assumption or applicable federal law.

For avoidance of doubt, insurance policies of the Debtors shall not be deemed executory contracts and, except as expressly provided in Section 10.6 of the Plan, such policies of insurance shall not be deemed assumed by the Reorganized Debtors.

10.2. *Claims Based on Rejection of Executory Contracts or Unexpired Leases.*

All Rejection Damages Claims, if any, will be treated as Other Unsecured Claims. Upon receipt of the Plan Distribution provided in Section 5.5 of this Plan, all Rejection Damages Claims shall be discharged as of the Effective Date, and shall not be enforceable against the Debtors, the Reorganized Debtors or their respective properties or interests in property. In the event that the rejection of an executory contract or unexpired lease by any of the Debtors pursuant to the Plan results in damages to the other party or parties to such contract or lease, any Rejection Damages Claim on account of such damages, if not evidenced by a timely filed proof of claim, shall be forever barred and shall not be enforceable against the Debtors or the Reorganized Debtors, or their respective properties or interests in property as agents, successors or assigns, unless a proof of claim is filed with the Bankruptcy Court and served upon counsel for the Debtors, the Reorganized Debtors, and the Creditor Representative, respectively, on or

before the date that is thirty (30) days after the effective date of such rejection (which may be the Effective Date or the date on which the Debtors reject the applicable contract or lease pursuant to an order of the Bankruptcy Court).

Section 9.1 of the Plan shall govern the objection to, other contest of the allowance of, or other settlement or compromise of Rejection Damages Claims, provided, however, that the Claims Objection Deadline for Rejection Damages Claims shall be (i) if the effective date of such rejection is the Effective Date, the first Business Day that is ninety (90) days after the Effective Date; (ii) if the effective date of such rejection is another date, the First Business Day that is ninety (90) days after the effective date of such rejection or as otherwise provided by the order of the Bankruptcy Court rejecting the applicable contract or lease.

10.3. *Cure of Defaults for Assumed Executory Contracts and Unexpired Leases.*

(a) The Debtors shall cause the *Notice of (I) Possible Assumption of Contracts and Leases, (II) Fixing of Cure Amounts, and (III) Deadline to Object Thereto* (the “**Cure Notice**”), in a form substantially similar to the form attached to the Disclosure Statement Order, to be served on the non-Debtor parties to all executory contracts and unexpired leases to be assumed as part of the Plan no later than twenty (20) days prior to the commencement of the Confirmation Hearing. Among other things, the Cure Notice shall set forth the amount that the Debtors believe must be paid in order to cure all monetary defaults under each of the executory contracts and unexpired leases to be assumed as part of the Plan.

(b) The non-Debtor parties to the Assumed Executory Contracts and Unexpired Leases shall have until 5:00 p.m. (prevailing Eastern Time) on the date established by the Disclosure Statement Order (the “**Cure Objection Deadline**”), which deadline may be extended in the sole discretion of the Debtors, to object (a “**Cure Objection**”) to the (i) Cure Amounts listed by the Debtors and to propose alternative Cure Amounts, and/or (ii) proposed assumption of the Assumed Executory Contracts and Unexpired Leases under the Plan; provided, however, that if the Debtors amend the Cure Notice or any related pleading that lists the executory contracts and unexpired leases to add a contract or lease or to reduce the Cure Amount thereof, except where such reduction was based upon the mutual agreement of the parties, the non-Debtor party thereto shall have at least seven (7) days after service of such amendment to object thereto or to propose an alternative Cure Amount.

(c) If a Cure Objection is timely filed and the parties are unable to settle such Cure Objection (each, a “**Cure Dispute**”), the Bankruptcy Court shall determine the amount of any disputed Cure Amount(s) or objection to assumption at a hearing to be held at the time of the Confirmation Hearing or such other hearing date to which the parties may mutually agree or as ordered by the Bankruptcy Court. The Debtors may, in their sole discretion, extend the Cure Objection Deadline without further notice, but are not obligated to do so.

(d) In the event that no Cure Objection is timely filed with respect to an Assumed Executory Contract or Unexpired Lease to be assumed under the Plan, the counterparty to such Assumed Executory Contract or Unexpired Lease shall be deemed to have consented to the assumption of such executory contract or unexpired lease and the Cure Amount proposed by the Debtors and shall be forever enjoined and barred from seeking any additional amount(s) on

account of the Debtors' cure obligations under section 365 of the Bankruptcy Code or otherwise from the Debtors, their Estates or the Reorganized Debtors; provided, however, that the counterparty to such executory contract or unexpired lease may seek additional amount(s) on account of any defaults occurring between the filing of the Cure Notice and the occurrence of the Effective Date of the Plan.

(e) The inclusion of an executory contract or unexpired lease in the Cure Notice is without prejudice to the Debtors' right to modify their election to assume or to reject such executory contract or unexpired lease prior to the entry of a Final Order (which Final Order may be the Confirmation Order) approving the assumption of any such executory contract or unexpired lease, and inclusion in the Cure Notice is not a final determination that any executory contract or unexpired lease will, in fact, be assumed.

10.4. *Surety Agreements*

As of and subject to the occurrence of the Effective Date, the Reorganized Debtors shall assume the Surety Agreements to the extent they are executory contracts, and if any Surety Agreement is not subject to assumption pursuant to section 365 of the Bankruptcy Code, such Surety Agreement shall vest in the Reorganized Debtors on the Effective Date. For the avoidance of doubt, upon the Effective Date or within thirty (30) days thereafter, upon request from a surety that has provided surety bonds to the Debtors prior to or during the Reorganization Cases, the Reorganized Debtors shall reaffirm all of the Debtors' obligations and duties under the pre-petition surety indemnity agreements. Further, any Claims arising from or relating to the Surety Agreements entered into prior the Commencement Date shall be deemed to be unimpaired by this Plan.

10.5. *Pension Plan*

For the avoidance of doubt, the Pension Plan shall not be modified or affected by any provision of the Plan and shall be continued after the Effective Date in accordance with its terms. The Debtors or the Reorganized Debtors shall satisfy the minimum funding standards pursuant to 26 U.S.C. §§ 412, 430, and 29 U.S.C. § 1082, 1083 and be liable for the payment of PBGC premiums in accordance with 29 U.S.C. §§ 1306 and 1307 subject to any and all applicable rights and defenses of the Debtors or the Reorganized Debtors, and administer the Pension Plan in accordance with the provisions of ERISA and the Internal Revenue Code. In the event that the Pension Plan terminates after the Effective Date, the Reorganized Debtors and each of its controlled group members will be responsible for the liabilities imposed by Title IV of ERISA, to the extent provided for therein.

Notwithstanding any provision in the Plan or Disclosure Statement, neither the Plan nor the Disclosure Statement will (1) release, discharge or exculpate any party with respect to "controlled group liability" owed to the Pension Plan or PBGC under ERISA or the Internal Revenue Code; (2) release, discharge or exculpate any party for fiduciary breach related to the Pension Plan; or (3) enjoin or prevent the Pension Plan and the PBGC from collecting such liability from a liable party or any controlled members.

10.6. *ACE Insurance Program*

Notwithstanding anything to the contrary in the Disclosure Statement, the Plan, the Plan Documents, or the Plan Supplement (including, without limitation, any other provision that purports to be preemptory or supervening or grants an injunction or release): (a) on the Effective Date, the Reorganized Debtors shall assume the ACE Insurance Program in its entirety under 11 U.S.C. § 365 to the extent it is executory, and, if the ACE Insurance Program is not executory, the ACE Insurance Program (in its entirety) shall vest in the Reorganized Debtors on the Effective Date under 11 U.S.C. § 105; (b) nothing in the Disclosure Statement, the Plan, the Plan Documents, or the Plan Supplement alters, modifies or otherwise amends the terms and conditions of (or the coverage provided by) the ACE Insurance Program, except that as of the Effective Date, the Reorganized Debtors shall become and remain liable for all of the Debtors' obligations and liabilities under the ACE Insurance Program, whether now existing or hereafter arising and whether arising, accruing, and/or existing before or after the Effective Date, including, without limitation, the duty to continue to provide collateral and security, and pay deductibles and/or self insured retentions as required by the ACE Insurance Program; (c) nothing in the Disclosure Statement, the Plan, the Plan Documents, or the Plan Supplement, any prepetition or administrative claim bar date order (or notice) or claim objection order alters or modifies the duty, if any, that the ACE Companies have to pay claims covered by the ACE Insurance Program and seek payment or reimbursement from the Debtors (or after the Effective Date, the Reorganized Debtors) or draw on the collateral or security therefor; (d) the claims of the ACE Companies arising (whether before or after the Effective Date) under the ACE Insurance Program (i) shall be paid in full by the Debtors (or after the Effective Date, by the Reorganized Debtors) in the ordinary course of business in accordance with the ACE Insurance Program, and (ii) shall not be discharged or released by the Plan; (e) the ACE Companies shall not need to or be required to file or serve a Cure Dispute or a request, application, claim, proof or motion for payment and shall not be subject to the any bar date or similar deadline governing Cure Amounts or Claims; and (f) the automatic stay of Bankruptcy Code section 362(a) and the injunctions set forth in Article XII of the Plan, if and to the extent applicable, shall be deemed lifted without further order of this Court, solely to permit: (A) claimants with valid workers' compensation claims covered by the workers' compensation policies to proceed with their claims; (B) the ACE Companies to administer, handle, defend, settle, and/or pay, in the ordinary course of business and without further order of this Court, (i) all valid workers' compensation claims arising under the workers' compensation policies issued by any of the ACE Companies, (ii) all claims where a claimant asserts a direct claim against the ACE Companies under applicable law, the claimant has been awarded a judgment and the applicable policy contains an MCS-90 endorsement, or an order has been entered by this Court granting a claimant relief from the automatic stay to proceed with its claim and (iii) all costs in relation to each of the foregoing; (C) the ACE Companies to draw against any or all of the collateral or security provided by or on behalf of the Debtors (or the Reorganized Debtors, as applicable) at any time and to hold the proceeds thereof as security for the obligations of the Debtors (and the Reorganized Debtors, as applicable) to the ACE Companies and/or apply such proceeds to the obligations of the Debtors (and the Reorganized Debtors, as applicable) under the ACE Insurance Program, in such order as the ACE Companies may determine; and (D) the ACE Companies to (i) cancel any policies under the ACE Insurance Program, and (ii) take other actions relating thereto, to the extent permissible under applicable non-bankruptcy law, each in accordance with the terms of the ACE Insurance Program.

ARTICLE XI.

CONDITIONS PRECEDENT TO CONFIRMATION AND CONSUMMATION OF THE PLAN

11.1. *Conditions Precedent to Confirmation.*

Confirmation of this Plan is subject to:

- (a) the Disclosure Statement having been approved by the Bankruptcy Court as having adequate information in accordance with section 1125 of the Bankruptcy Code;
- (b) entry of the Confirmation Order in form and substance reasonably satisfactory to the Debtors, the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors' Committee;
- (c) the Plan Documents in form and substance reasonably satisfactory to the Debtors, the Required Consenting Lenders, the Required Consenting Noteholders and the Creditors' Committee (in each case, to the extent set forth in Section 1.122 of the Plan) having been filed in substantially final form prior to the Confirmation Hearing, and all conditions to Plan confirmation contained therein shall have been satisfied; and
- (d) the Restructuring Support Agreement remaining in full force and effect, and not having been terminated.

11.2. *Conditions Precedent to the Effective Date.*

The occurrence of the Effective Date is subject to:

- (a) the Confirmation Order in form and substance reasonably satisfactory to the Debtors, the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors' Committee having been entered;
- (b) the Confirmation Order in form and substance reasonably satisfactory to the Debtors, the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors' Committee having become a Final Order;
- (c) the Plan Documents in form and substance reasonably satisfactory to the Debtors, the Required Consenting Lenders, the Required Consenting Noteholders and the Creditors' Committee (in each case, to the extent set forth in Section 1.122 of the Plan) having been executed and delivered, and any conditions (other than the occurrence of the Effective Date or certification by the Debtors that the Effective Date has occurred) contained therein having been satisfied or waived in accordance therewith;
- (d) all material governmental, regulatory and third party approvals, waivers and/or consents in connection with the Plan, if any, having been obtained and remaining in full force and effect, and there existing no claim, action, suit, investigation, litigation or proceeding,

pending or threatened in any court or before any arbitrator or governmental instrumentality, which would prohibit the consummation of the Plan;

(e) (i) the Amended and Restated Secured Credit Agreement, Backstop Term Loan, Exit LC Facility, and all other Plan Documents having been executed and/or consummated, and being in full force and effect, and (ii) the extension of credit under the Amended and Restated Secured Credit Agreement, the Backstop Term Loan and the Exit LC Facility being available upon (and subject to) the Effective Date;

(f) the Debtors having cash on hand as of the Effective Date of at least \$20 million;

(g) all actions, agreements, certificates, instruments and other documents necessary to implement the terms or provisions of the Plan, including, without limitation, issuance of the New Common Stock certificates and the Rights Offering Stock certificates, shall have been effected or executed and delivered, as applicable, in form and substance reasonably satisfactory to the Debtors; and

(h) the Restructuring Support Agreement remaining in full force and effect, and not having been terminated.

11.3. *Waiver of Conditions Precedent and Bankruptcy Rule 3020(e) Automatic Stay.*

Other than the requirement that the Confirmation Order must be entered, which cannot be waived, the requirement that a particular condition be satisfied may be waived in whole or part by the Debtors, with the consent of the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors' Committee (which consents shall not be unreasonably withheld or delayed), without notice and a hearing, and the Debtors' benefits under the "mootness doctrine" shall be unaffected by any provision hereof. The failure of the Debtors to assert the non-satisfaction of any such conditions shall not be deemed a waiver of any other rights hereunder, and each such right shall be deemed an ongoing right that may be asserted or waived (as set forth herein) at any time or from time to time.

11.4. *Effect of Failure of Conditions.*

If each of the conditions to confirmation and consummation of the Plan and the occurrence of the Effective Date has not been satisfied or duly waived on or before December 31, 2013 if the condition that the Confirmation Order become a Final Order is waived, or January 7, 2014 if such condition is not waived, or by such later date as is proposed by the Debtors and is approved by the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors' Committee and, after notice and a hearing, by the Bankruptcy Court, upon motion by any party in interest made before the time that each of the conditions has been satisfied or duly waived, the Confirmation Order may be vacated by the Bankruptcy Court; provided, however, that notwithstanding the filing of such a motion, the Confirmation Order shall not be vacated if each of the conditions to consummation is either satisfied or duly waived before the Bankruptcy Court enters an order granting the relief requested in such motion. If the Confirmation Order is vacated pursuant to this section, the Plan shall be

null and void in all respects, and nothing contained in the Plan shall: (a) constitute a waiver or release of any Claims against or Interests in the Debtors; or (b) prejudice in any manner the rights of the Debtors, including the right to seek a further extension of the exclusive periods to file and solicit votes with respect to a plan under section 1121(d) of the Bankruptcy Code.

11.5. *Withdrawal of the Plan.*

Subject to the reasonable consent of the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors' Committee (which consents shall not be unreasonably withheld or delayed), and subject to section 1127 of the Bankruptcy Code, the Debtors reserve the right to modify or revoke and withdraw the Plan at any time before the Confirmation Date or, if the Debtors are for any reason unable to consummate the Plan after the Confirmation Date, at any time up to the Effective Date. If the Debtors revoke and withdraw the Plan: (a) nothing contained herein shall be deemed to constitute a waiver or release of any claims by or against the Debtors or to prejudice in any manner the rights of the Debtors or any Persons in any further proceeding involving the Debtors; and (b) the result shall be the same as if the Confirmation Order were not entered, the Plan was not filed and no actions were taken to effectuate it.

ARTICLE XII.

EFFECT OF CONFIRMATION

12.1. *Binding Effect.*

This Plan shall be binding and inure to the benefit of the Debtors, all holders of Claims and Interests, and their respective successors and assigns.

12.2. *Vesting of Assets and Retention of Causes of Action.*

Except as otherwise provided in the Plan (including, but not limited to, Sections 7.16 and 12.8 of this Plan), on the Effective Date all property comprising the Estates (including, subject to any release provided for herein, any claim, right or cause of action which may be asserted by or on behalf of the Debtors, including the Estate Accounting-Related Causes of Action (except as provided below) and Business Causes of Action) shall be vested in the Reorganized Debtors free and clear of all Claims and Interests including any and all claims, liens, charges, encumbrances and interests of creditors, equity security holders, or other Persons, except for the rights to Plan Distributions under the Plan. After the Effective Date, the Reorganized Debtors shall have no liability to holders of claims, liens, charges, encumbrances and interests of creditors, equity security holders, or other Persons, except as expressly provided for in the Plan. As of the Effective Date, the Reorganized Debtors may operate each of their respective businesses and use, acquire and settle and compromise claims or interests without supervision of the Bankruptcy Court, free of any restrictions of the Bankruptcy Code or Bankruptcy Rules, other than those restrictions expressly imposed by the Plan and Confirmation Order.

Notwithstanding anything to the contrary herein, net proceeds of Estate Accounting-Related Causes of Action shall be shared on a pro rata basis among the Litigation

Trust Beneficiaries. At the option of the Required Consenting Noteholders, the Estate Accounting-Related Causes of Action will either vest with the Reorganized Debtors, a litigation trustee or other party designated by the Consenting Noteholders, and the decision whether to prosecute such claims (and the prosecution of such claims) shall be at the sole discretion of the Reorganized Debtors, such litigation trustee or such other designated party. To the extent the Estate Accounting-Related Causes of Action vest with a litigation trustee or other party designated by the Consenting Noteholders, the Creditor Representative shall have the right to review any governing document(s) or agreement(s) related to the vesting of the Estate Accounting-Related Causes of Action.

12.3. Discharge of Claims Against and Interests in the Debtors.

(a) **Scope.** Except as otherwise provided in the Plan or Confirmation Order, in accordance with section 1141(d)(1) of the Bankruptcy Code, entry of the Confirmation Order acts as a discharge, effective as of the Effective Date, of all debts of, Claims against, liens on, and Interests in the Debtors, their assets or properties, which debts, Claims, liens, and Interests arose at any time before the entry of the Confirmation Order. The discharge of the Debtors shall be effective as to each Claim, regardless of whether a proof of claim therefor was filed, whether the Claim is an Allowed Claim or whether the holder thereof votes to accept the Plan. On the Effective Date, as to every discharged Claim and Interest, any holder of such Claim or Interest shall be precluded from asserting against the Debtors, the Reorganized Debtors or the assets or properties of any of them, any other or further Claim or Interest based upon any document, instrument, act, omission, transaction or other activity of any kind or nature that occurred before the Confirmation Date.

(b) **Injunction.** In accordance with section 524 of the Bankruptcy Code, the discharge provided by this Section 12.3 and section 1141 of the Bankruptcy Code, *inter alia*, acts as an injunction against the commencement or continuation of any action, employment of process or act to collect, offset or recover the Claims, liens and Interests discharged hereby.

(c) **Release of Liens.** Except with respect to Class 2 Claims (i) each holder of a Secured Claim or a Claim that is purportedly secured (including an Other Secured Claim) shall, on or immediately before the Effective Date and as a condition to receiving any Plan Distribution: (A) turn over and release to the Debtors, or the Reorganized Debtors, as applicable, any and all property of the Debtors or the Estates that secures or purportedly secures such Claim; and (B) execute such documents and instruments as the Debtors or the Reorganized Debtors require to evidence such claimant's release of such property; and (ii) on the Effective Date (or such other date described in this subsection), all claims, right, title and interest in such property shall revert to the Reorganized Debtors free and clear of all Claims and Interests, including any and all liens, charges, pledges, encumbrances and/or security interests of any kind. All liens of the holders of such Claims or Interests in property of the Debtors, the Estates, and/or the Reorganized Debtors shall be deemed to be canceled and released as of the Effective Date (or such other date described in this subsection). Notwithstanding the immediately preceding sentence, any such holder of a Disputed Claim shall not be required to execute and deliver such release of liens until ten (10) days after such Claim becomes an Allowed Claim or is Disallowed. To the extent any holder of a Claim described in the first sentence of this subsection fails to release the relevant liens as described above, the Reorganized Debtors may act as attorney-in-

fact, on behalf of the holders of such liens, to provide any releases as may be required by any lender under the Amended and Restated Secured Credit Agreement or for any other purpose.

(d) ***Cancellation of Stock/Instruments.*** The Existing Common Stock Interests, the DIP Credit Agreement, the Secured Credit Agreement, the Indentures and the Notes (each including any related credit agreement, indenture, security and guaranty agreements, interest rate agreements and commodity hedging agreements) and any other note, bond, indenture or other instrument or document evidencing or creating any indebtedness or obligation of the Debtors are not required to be surrendered and shall be deemed cancelled on the Effective Date provided, however, that notwithstanding the foregoing and anything else contained in the Plan, the Indentures and the Notes shall continue in effect solely for the purposes of (i) allowing the Notes Trustee to make the Plan Distributions to be made on account of the Notes under the Plan and for the Notes Trustee to perform such other necessary functions with respect thereto and to have the benefit of all of the protections and other provisions of the Indentures, including, but not limited to, its right to compensation, reimbursement of fees and expenses (including the fees and expenses of its counsel, agents, and advisors), and indemnification, in doing so, (ii) preserving any rights of the Notes Trustee to indemnification or contribution from the Noteholders pursuant and subject to terms of the Indentures as in effect immediately prior to the Effective Date, and (iii) permitting the Notes Trustee to maintain or assert any right or charging lien it may have against distributions pursuant to the terms of the Plan to recover unpaid fees and expenses (including the fees and expenses of its counsel, agents, and advisors) of the Notes Trustee, provided further that the Secured Credit Agreement shall continue in effect for purposes of allowing the Secured Credit Agreement Administrative Agent to receive the Prepayment and apply it to the Secured Lender Claims, and shall be amended and restated pursuant to the Amended and Restated Secured Credit Agreement. For the avoidance of doubt, on and after the Effective Date, all duties and responsibilities of the Notes Trustee under the Indentures shall be discharged except to the extent required in order to effectuate the Plan.

12.4. *Survival of Certain Indemnification Obligations.*

The obligations of the Debtors to indemnify individuals who serve or served on or after the Commencement Date as their respective directors, officers, agents, employees, representatives, and Professional Persons retained by the Debtors pursuant to the Debtors' operating agreements, certificates of incorporation, by-laws, applicable statutes, pre-confirmation agreements and, to the extent required pursuant to section 327 of the Bankruptcy Code, by order of the Bankruptcy Court in respect of all present and future actions, suits and proceedings against any of such officers, directors, agents, employees, representatives, and Professional Persons, based upon any act or omission related to service with, for, or on behalf of the Debtors from the Commencement Date through and including the Effective Date, as such obligations were in effect at the time of any such act or omission, shall not be expanded, discharged or impaired by confirmation or consummation of the Plan but shall survive unaffected by the reorganization contemplated by the Plan and shall be performed and honored by the Reorganized Debtors regardless of such confirmation, consummation and reorganization, and regardless of whether the underlying claims for which indemnification is sought are released pursuant to the Plan. For the avoidance of doubt any claim, right or cause of action which may be asserted by or on behalf of the Debtors for indemnification or otherwise under that certain Stock Purchase and Sale Agreement dated September 27, 2011 by and among Debtor Rural/Metro of Northern California,

Inc. and the Security Holders of Pacific Ambulance, Inc. and Bowers Companies, Inc. and Brian H. Cates and Raymond S. Iskander shall be vested in the Reorganized Debtors free and clear of all Claims and Interests including any and all claims, liens, charges, encumbrances and interests of creditors, equity security holders, or other Persons in accordance with Section 12.2 of this Plan.

For the further avoidance of doubt and notwithstanding anything to the contrary, with respect to any Allowed Other Unsecured Claim that elected to receive Other Unsecured Cash pursuant to Section 5.5(a)(ii) of the Plan as to which one or more of the Debtors or their Estates has a claim, right or cause of action of indemnification (a “**Debtor Indemnification Claim**”) against any third party, including any such Debtor Indemnification Claim secured by an escrow or other collateral or credit support, the Creditor Representative may request that the Reorganized Debtors assert a Debtor Indemnification Claim such that the amount of such Allowed Other Unsecured Claim would otherwise be entitled to from Other Unsecured Cash is satisfied through the Debtor Indemnification Claim. Provided that a Debtor Indemnification Claim is secured by an escrow or other collateral or credit support, the Reorganized Debtors shall be obligated to assert such Debtor Indemnification Claim provided that the request made by the Creditor Representative is reasonable and made in good faith. In the event that the Reorganized Debtors decline or otherwise do not assert a Debtor Indemnification Claim so requested by the Creditor Representative in accordance with this Section 12.4, the Creditor Representative may assert such Debtor Indemnification Claim on behalf of the Debtors or their Estates, and the Reorganized Debtors shall reimburse and pay the Creditor Representative for all costs (including fees and expenses of counsel) of pursuing such Debtor Indemnification Claim. Notwithstanding anything to the contrary, the Creditor Representative shall only have rights to any escrow or other collateral or credit support for any such Debtor Indemnification Claim if the Reorganized Debtors do not need, will not use or otherwise cannot or have no right to use such escrow or other collateral or credit support for any Debtor Indemnification Claim. Any Allowed Other Unsecured Claim satisfied through a Debtor Indemnification Claim shall not be entitled to any Plan Distributions under this Plan and shall not be considered an Allowed Other Unsecured Claim or in Class 5 – Other Unsecured Claims for any purposes under this Plan.

12.5. Term of Pre-Confirmation Injunctions or Stays.

Unless otherwise provided herein, all injunctions or stays arising prior to the Confirmation Date in accordance with sections 105 or 362 of the Bankruptcy Code, or otherwise, and in existence on the Confirmation Date, shall remain in full force and effect until the Effective Date.

12.6. Injunction Against Interference With Plan.

Upon the entry of the Confirmation Order, all holders of Claims and Interests and other parties in interest, along with their respective present or former affiliates, employees, agents, officers, directors, or principals, shall be enjoined from taking any actions to interfere with the implementation or consummation of this Plan.

12.7. Injunction.

Except as otherwise provided in the Plan or the Confirmation Order, as of the Confirmation Date, but subject to the occurrence of the Effective Date, all Persons who have held, hold or may hold Claims against or Interests in the Debtors or the Estates are, with respect to any such Claims or Interests, permanently enjoined after the Confirmation Date from: (i) commencing, conducting or continuing in any manner, directly or indirectly, any suit, action or other proceeding of any kind (including any proceeding in a judicial, arbitral, administrative or other forum) against or affecting the Debtors, the Reorganized Debtors, the Estates or any of their property, or any direct or indirect transferee of any property of, or direct or indirect successor in interest to, any of the foregoing Persons or any property of any such transferee or successor; (ii) enforcing, levying, attaching (including any pre-judgment attachment), collecting or otherwise recovering by any manner or means, whether directly or indirectly, any judgment, award, decree or order against the Debtors, the Reorganized Debtors, or the Estates or any of their property, or any direct or indirect transferee of any property of, or direct or indirect successor in interest to, any of the foregoing Persons, or any property of any such transferee or successor; (iii) creating, perfecting or otherwise enforcing in any manner, directly or indirectly, any encumbrance of any kind against the Debtors, the Reorganized Debtors, or the Estates or any of their property, or any direct or indirect transferee of any property of, or successor in interest to, any of the foregoing Persons, or any property of such transferee or successor; (iv) acting or proceeding in any manner, in any place whatsoever, that does not conform to or comply with the provisions of the Plan to the full extent permitted by applicable law; (v) asserting any right of setoff (except to the extent timely asserted prior to the Petition Date), or subrogation of any kind against any obligation due from the Debtors, the Reorganized Debtors, the Estates or any of their property, or any direct or indirect transferee of any property of, or successor in interest to, any of the foregoing Persons, or any property of such transferee or successor; (vi) commencing or continuing, in any manner or in any place, any action that does not comply with or is inconsistent with the provisions of the Plan; provided, further, that the Releasing Parties are, with respect to Claims or Interests held by such parties, permanently enjoined after the Confirmation Date from taking any actions referred to in clauses (i) through (vi) above against the Released Parties or any direct or indirect transferee of any property of, or direct or indirect successor in interest to, any of the Released Parties or any property of any such transferee or successor; provided, however, that nothing contained herein shall preclude any Person from exercising its rights, or obtaining benefits, directly and expressly provided to such entity pursuant to and consistent with the terms of the Plan, the Plan Supplement and the contracts, instruments, releases, agreements and documents delivered in connection with the Plan.

All Persons releasing claims pursuant to Section 12.8 of this Plan shall be permanently enjoined, from and after the Confirmation Date, from taking any actions referred to in clauses (i) through (vi) of the immediately preceding paragraph against any party with respect to any claim released pursuant to Section 12.8 of this Plan.

12.8. Releases.

(a) Releases by the Debtors. Except as otherwise expressly set forth in the Plan or the Confirmation Order, as of the Effective Date, for the good and valuable

consideration provided by each of the Released Parties, the adequacy of which is hereby confirmed, including the good faith settlement and compromise of the claims released herein and the services of the Debtors' current officers, directors, managers and advisors in facilitation of the expeditious implementation of the transactions contemplated hereby, each Debtor and debtor in possession, and any Person seeking to exercise the rights of the Debtors' Estates, including the Reorganized Debtors, any successor to the Debtors, or any representative of the Debtors' estates appointed or selected pursuant to sections 1103, 1104, or 1123(b)(3) of the Bankruptcy Code or under chapter 7 of the Bankruptcy Code, shall be deemed to conclusively, absolutely, unconditionally, irrevocably and forever release, waive and discharge and shall be deemed to have provided a full discharge and release to each Released Party and their respective property (and each such Released Party so released shall be deemed fully released and discharged by each Debtor, debtor in possession, and any person seeking to exercise the rights of the Debtors' estates, including the Reorganized Debtors, any successor to the Debtors, or any representative of the Debtors' estates appointed or selected pursuant to sections 1103, 1104, or 1123(b)(3) of the Bankruptcy Code or under chapter 7 of the Bankruptcy Code) from all Claims, obligations, debts, suits, judgments, damages, demands, rights, causes of action, remedies and liabilities whatsoever, (other than all rights, remedies and privileges to enforce the Plan, the Plan Supplement and the contracts, instruments, releases, indentures and other agreements or documents (including the Plan Documents) delivered under or in connection with the Plan) whether liquidated or unliquidated, fixed or contingent, matured or unmatured, known or unknown, foreseen or unforeseen, existing or hereafter arising, in law, equity or otherwise that are based on, related to, or in any manner arising from, in whole or in part, any act, omission, transaction, event or other occurrence taking place on or prior to the Effective Date in any way relating to the Debtors, the Reorganized Debtors, the subject matter of, or the transactions or events giving rise to, any Claim or Interest that is treated in the Plan, the business or contractual arrangements between any Debtor and any Released Party, the restructuring of Claims or Interests prior to or in the Reorganization Cases, the Reorganization Cases, the Plan or the Disclosure Statement, or any related contracts, instruments, releases, agreements and documents, or upon any other act or omission, transaction, agreement, event or other occurrence taking place on or before the Effective Date, and that could have been asserted by or on behalf of the Debtors, the debtors in possession or their Estates, or any of their affiliates, whether directly, indirectly, derivatively or in any representative or any other capacity, individually or collectively, in their own right or on behalf of the holder of any Claim or Interest or other entity, against any Released Party and its respective property; provided, however, that in no event shall anything in this Section 12.8(a) be construed as a release of any (i) Intercompany Claim or (ii) a Person's fraud, gross negligence, or willful misconduct, as determined by a Final Order, for matters with respect to the Debtors.

(b) Releases by Holders of Claims and Interests. Except as expressly set forth in the Plan or the Confirmation Order, on the Effective Date, to the fullest extent permissible under applicable law, as such law may be extended or interpreted subsequent to the Effective Date, each Releasing Party (regardless of whether such Releasing Party is a Released Party), in consideration for the obligations of the Debtors and the other Released Parties under the Plan, the Plan Distributions, and the contracts, instruments, releases, agreements or documents executed and delivered in connection with the Plan and the Restructuring Transaction, will be deemed to have consented to the Plan for all purposes and the restructuring embodied herein and deemed to conclusively, absolutely, unconditionally, irrevocably and forever release, waive

and discharge (and each entity so released shall be deemed released and discharged by the Releasing Parties) all Claims, obligations, debts, suits, judgments, damages, demands, rights, causes of action, remedies or liabilities whatsoever, including all derivative claims asserted or which could be asserted on behalf of a Debtor (other than all rights, remedies and privileges of any party under the Plan, the Plan Supplement and the contracts, instruments, releases, and other agreements or documents (including the Plan Documents) delivered under or in connection with the Plan), including any claims for any such loss such holder may suffer, have suffered or be alleged to suffer as a result of the Debtors commencing the Reorganization Cases or as a result of the Plan being consummated, whether liquidated or unliquidated, fixed or contingent, matured or unmatured, known or unknown, foreseen or unforeseen, then existing or thereafter arising, in law, equity or otherwise that are based on, related to, or in any manner arising from, in whole or in part, any act or omission, transaction, event or other occurrence taking place on or prior to the Effective Date in any way relating to the Debtors, the Reorganized Debtors, the Reorganization Cases, the purchase or sale or rescission of the purchase or sale of any security of the Debtors or the Reorganized Debtors, the subject matter of, or the transactions or events giving rise to, any Claim or Interest that is treated in the Plan, the business or contractual arrangements between any Debtor and any Releasing Party, the restructuring of Claims or Interests prior to or in the Reorganization Cases, the Plan or the Disclosure Statement or any related contracts, instruments, releases, agreements and documents, or upon any other act or omission, transaction, agreement, event or other occurrence with respect to the Debtors or the Debtors' property taking place on or before the Effective Date, against any Released Party and its respective property; provided, however, that in no event shall anything in this Section 12.8(b) be construed as a release of any (i) Intercompany Claim or (ii) a Person's fraud, gross negligence, or willful misconduct, as determined by a Final Order, for matters with respect to the Debtors.

Notwithstanding anything to the contrary contained herein, with respect to a Released Party that is a non-Debtor, nothing in the Plan or the Confirmation Order shall effect a release of any claim by the United States government or any of its agencies whatsoever, including any claim arising under the Internal Revenue Code, the environmental laws or any criminal laws of the United States against such Released Party, nor shall anything in the Confirmation Order or the Plan enjoin the United States from bringing any claim, suit, action or other proceeding against such Released Party for any liability whatever, including any claim, suit or action arising under the Internal Revenue Code, the environmental laws or any criminal laws of the United States, nor shall anything in the Confirmation Order or the Plan exculpate any non-Debtor party from any liability to the United States Government or any of its agencies, including any liabilities arising under the Internal Revenue Code, the environmental laws or any criminal laws of the United States against such Released Party.

Notwithstanding anything to the contrary contained herein, except to the extent permissible under applicable law, as such law may be extended or interpreted subsequent to the Effective Date, except with respect to a Released Party that is a Debtor, nothing in the Confirmation Order or the Plan shall effect a release of any claim by any state or local authority whatsoever, including any claim arising under the environmental laws or any criminal laws of any state or local authority against any Released Party that is a non-Debtor, nor shall anything in the Confirmation Order or the Plan enjoin any state or local authority from bringing any claim, suit, action or other proceeding against any Released Party that is a non-Debtor for any

liability whatever, including any claim, suit or action arising under the environmental laws or any criminal laws of any state or local authority, nor shall anything in the Confirmation Order or the Plan exculpate any party from any liability to any state or local authority whatsoever, including any liabilities arising under the environmental laws or any criminal laws of any state or local authority against any Released Party that is a non-Debtor. As to any state or local authority, nothing in the Plan or Confirmation Order shall discharge, release, or otherwise preclude any valid right of setoff or recoupment.

As to the United States, its agencies, departments or agents, nothing in the Plan or Confirmation Order shall discharge, release, or otherwise preclude: (i) any liability of the Debtors or Reorganized Debtors arising on or after the Effective Date; or (ii) any valid right of setoff or recoupment. Furthermore, nothing in the Plan or the Confirmation Order: (i) discharges, releases, or precludes any environmental liability that is not a Claim, or any environmental Claim of a governmental unit that arises on or after the Effective Date; (ii) releases the Debtors or the Reorganized Debtors from any non-dischargeable liability under environmental law as the owner or operator of property that such persons own or operate after the Effective Date; (iii) releases or precludes any environmental liability to a governmental unit on the part of any Persons other than the Debtors and Reorganized Debtors; or (D) enjoins a governmental unit from asserting or enforcing outside this Court any liability described in this paragraph.

12.9. Exculpation and Limitation of Liability.

No Exculpated Party shall have or incur any liability to any holder of any Claim or Interest for any prepetition or postpetition act or omission in connection with the negotiation and execution of the Restructuring Support Agreement, the Plan, the Plan Documents, the Reorganization Cases, the Disclosure Statement, the dissemination of the Plan, the solicitation of votes for and the pursuit of the Plan, the consummation of the Plan, or the administration of the Plan or the property (including the New Common Stock and any other security offered, issued or distributed in connection with the Plan) to be distributed under the Plan, including all documents ancillary thereto, all decisions, actions, inactions and alleged negligence or misconduct relating thereto and all prepetition or postpetition activities taken or omission in connection with the Plan, Restructuring Support Agreement or the Reorganization Cases of the Debtors except fraud, gross negligence or willful misconduct, each as determined by a Final Order. The Exculpated Parties shall be entitled to rely upon the advice of counsel with respect to their duties and responsibilities under the Plan; provided, however, solely to the extent that it would contravene Rule 1.8(h)(1) of the Delaware Lawyers' Rules of Professional Conduct, Rule 1.8(h)(1) of the New York Rules of Professional Conduct or any similar ethical rule of another jurisdiction, if binding on an attorney of any Exculpated Party, no attorney of any Exculpated Party shall be released by the Debtors or the Reorganized Debtors.

12.10. Injunction Related to Releases and Exculpation.

The Confirmation Order shall permanently enjoin the commencement or prosecution by any Person or entity, whether directly, derivatively or otherwise, of any Claims, obligations, suits, judgments, damages, demands, debts, rights, Causes of Action or liabilities released pursuant to this Plan.

12.11. *Protection Against Discriminatory Treatment.*

Consistent with section 525 of the Bankruptcy Code and the Supremacy Clause of the U.S. Constitution, all Persons shall not discriminate against the Reorganized Debtors or deny, revoke, suspend or refuse to renew a license, permit, charter, franchise or other similar grant to, condition such a grant to, discriminate with respect to such a grant against, the Reorganized Debtors or another Person with whom such Reorganized Debtors have been associated, solely because one of the Debtors has been a debtor under chapter 11, has been insolvent before the commencement of the Reorganization Cases (or during the Reorganization Cases but before the Debtors are granted or denied a discharge) or has not paid a debt that is dischargeable in the Reorganization Cases.

12.12. *Exclusive Jurisdiction.*

The Bankruptcy Court (and the United States District Court for the District of Delaware) shall retain exclusive jurisdiction to adjudicate any and all claims or causes of action released pursuant to Sections 12.8 or 12.9 (i) against any Released Party, (ii) relating to the Debtors, the Plan, the Plan Distributions, the New Common Stock, the Reorganization Cases, the Restructuring Transaction, or any contract, instrument, release, agreement or document executed and delivered in connection with the Plan and the Restructuring Transaction (including, without limitation, the Plan Documents), and (iii) brought by the Debtors (or any successor thereto), any Estate, creditor or litigation trust representative, or any holder of a Claim or Interest. This Section 12.12 shall not provide any jurisdiction of the Bankruptcy Court with respect to claims or causes of action that are not released pursuant to Sections 12.8 or 12.9 of the Plan; the Bankruptcy Court's jurisdiction over any such claims or causes of action shall be governed by Section 13.1 of the Plan (if applicable).

ARTICLE XIII.

ADMINISTRATIVE PROVISIONS

13.1. *Retention of Jurisdiction.*

(a) Purposes. Notwithstanding confirmation of the Plan or occurrence of the Effective Date, the Bankruptcy Court shall retain such jurisdiction as is legally permissible, including for the following purposes:

(i) to determine the allowability, classification, or priority of Claims upon objection by the Reorganized Debtors or any other party in interest entitled hereunder to file an objection (including the resolution of disputes regarding any Disputed Claims, claims for disputed Plan Distributions and Rejection Damages Claims), and the validity, extent, priority and nonavoidability of consensual and nonconsensual liens and other encumbrances;

(ii) to issue injunctions or take such other actions or make such other orders as may be necessary or appropriate to restrain interference with the Plan or its execution or implementation by any Person, to construe and to take any other action to enforce and execute the Plan, the Confirmation Order, or any other order

of the Bankruptcy Court, to issue such orders as may be necessary for the implementation, execution, performance and consummation of the Plan and all matters referred to herein, including any release or injunction provisions set forth herein, and to determine all matters that may be pending before the Bankruptcy Court in the Reorganization Cases on or before the Effective Date with respect to any Person;

(iii) to protect the property of the Estates from claims against, or interference with, such property, including actions to quiet or otherwise clear title to such property or to resolve any dispute concerning liens, security interest or encumbrances on any property of the Estate wherever located;

(iv) to determine any and all applications for allowance of Fee Claims;

(v) to determine any Priority Tax Claims, Priority Non-Tax Claims, Administrative Expense Claims or any other request for payment of claims or expenses entitled to priority under section 507(a) of the Bankruptcy Code;

(vi) to resolve any dispute arising under or related to the implementation, execution, consummation or interpretation of the Plan (including any release or injunction provisions set forth herein) and the making of Plan Distributions hereunder;

(vii) to determine any and all motions related to the rejection, assumption or assignment of executory contracts or unexpired leases, to determine any motion to reject an executory contract or unexpired lease pursuant to Section 10.3 of this Plan or to resolve any disputes relating to the appropriate Cure Amount or other issues related to the assumption of executory contracts or unexpired leases in the Reorganization Cases;

(viii) to determine all applications, motions, adversary proceedings, contested matters, actions, and any other litigated matters instituted in and prior to the closing of the Reorganization Cases, including any remands;

(ix) to enter a final decree closing each of the Reorganization Cases;

(x) to modify the Plan under section 1127 of the Bankruptcy Code, remedy any defect, cure any omission, or reconcile any inconsistency in the Plan or the Confirmation Order so as to carry out its intent and purposes;

(xi) to issue such orders in aid of consummation of the Plan and the Confirmation Order notwithstanding any otherwise applicable non-bankruptcy law, with respect to any Person, to the full extent authorized by the Bankruptcy Code;

(xii) to enable the Reorganized Debtors to prosecute any and all proceedings to set aside liens or encumbrances and to recover any transfers, assets, properties or damages to which the Debtors may be entitled under

applicable provisions of the Bankruptcy Code or any other federal, state or local laws except as may be waived pursuant to the Plan;

(xiii) to hear and determine matters concerning state, local, and federal taxes in accordance with sections 346, 505, and 1146 of the Bankruptcy Code;

(xiv) to enter and implement such orders as may be appropriate in the event the Confirmation Order is for any reason stayed, revoked, modified or vacated;

(xv) to resolve any disputes concerning whether a Person had sufficient notice of the Reorganization Cases, any applicable Bar Date, the hearing to consider approval of the Disclosure Statement or the Confirmation Hearing or for any other purpose;

(xvi) to resolve any dispute or matter arising under or in connection with any order of the Bankruptcy Court entered in the Reorganization Cases;

(xvii) to hear and resolve any causes of action involving the Debtors, the Reorganized Debtors or the Estates that arose prior to the Confirmation Date or in connection with the implementation of the Plan, including actions to avoid or recover preferential transfers or fraudulent conveyances;

(xviii) to resolve any disputes concerning any release of a non-Debtor hereunder or the injunction against acts, employment of process or actions against such non-Debtor arising hereunder;

(xix) to approve any Plan Distributions, or objections thereto, under the Plan;

(xx) To hear and resolve any disputes arising from or relating to (i) any orders of the Bankruptcy Court granting relief under Bankruptcy Rule 2004, or (ii) any protective orders entered by the Bankruptcy Court in connection with the foregoing;

(xxi) To resolve disputes concerning any reserves with respect to Disputed Claims or the administration thereof;

(xxii) to approve any Claims settlement entered into or offset exercised by the Debtors or Reorganized Debtors; and

(xxiii) to determine such other matters, and for such other purposes, as may be provided in the Confirmation Order, or as may be authorized under provisions of the Bankruptcy Code;

provided, however, notwithstanding anything to the contrary in the Plan or the Confirmation Order, after the Effective Date, the Bankruptcy Court's retention of jurisdiction shall not govern the enforcement of any Plan Document or any of the documentation related

thereto that has a choice of venue provision, which provision shall govern exclusively.

(b) Failure of the Bankruptcy Court to Exercise Jurisdiction. If the Bankruptcy Court abstains from exercising, or declines to exercise, jurisdiction or is otherwise without jurisdiction over any matter arising in, arising under, or related to the Reorganization Cases, then Section 13.1(a) of this Plan shall have no effect upon and shall not control, prohibit, or limit the exercise of jurisdiction by any other court having jurisdiction with respect to such matter.

13.2. *Retiree Benefits.*

On and after the Effective Date, pursuant to section 1129(a)(13) of the Bankruptcy Code, the Reorganized Debtors shall continue to pay all retiree benefits (within the meaning of, and subject to the limitations of, section 1114 of the Bankruptcy Code), if any, at the level established in accordance with section 1114 of the Bankruptcy Code, at any time prior to the Confirmation Date, for the duration of the period for which the Debtors had obligated themselves to provide such benefits. Nothing herein shall: (a) restrict the Debtors' or the Reorganized Debtors' right to modify the terms and conditions of the retiree benefits, if any, as otherwise permitted pursuant to the terms of the applicable plans, non-bankruptcy law, or section 1114(m) of the Bankruptcy Code; or (b) be construed as an admission that any such retiree benefits are owed by the Debtors.

13.3. *Creditors' Committee.*

The Creditors' Committee shall continue in existence until the Effective Date to exercise those powers and perform those duties specified in section 1103 of the Bankruptcy Code. On the Effective Date, the Creditors' Committee shall be dissolved automatically and its members shall be deemed released of all of their duties, responsibilities and obligations in connection with the Reorganization Cases or this Plan and its implementation, and the retention or employment of the Creditors' Committee's Professional Persons and agents shall terminate as of the Effective Date; provided, however, the Creditors' Committee shall survive solely in order for its Professional Persons to pursue their Fee Claims and represent the Creditors' Committee in connection with the review of and right to be heard in connection with all Fee Claims and the claims for fees and expenses of the professionals of the Consenting Noteholders and Consenting Lenders, respectively, as provided in the DIP Order and the Restructuring Support Agreement, and shall be compensated therefor in connection with the foregoing.

13.4. *Committee Member Expense Claims & Notes Trustee Fee Claims.*

(a) Subject to the below proviso, the Debtors or the Reorganized Debtors shall pay the reasonable, actual Committee Member Expense Claims on the Effective Date in respect of outstanding invoices submitted to the Debtors, counsel for the Consenting Noteholders and counsel for the Consenting Lenders on or prior to the tenth day immediately preceding the Effective Date (which invoices may include a reasonable estimate of fees and expenses that may be incurred from the date of the last invoice through the Effective Date), provided that none of the Debtors the Consenting Noteholders or the Consenting Lenders object to the reasonableness of the Committee Member Expense Claims. To the extent that the Debtors, the Consenting

Noteholders or the Consenting Lenders object to the reasonableness of any portion of the Committee Member Expense Claims, the Debtors or Reorganized Debtors, as applicable, shall not pay such disputed portion until either such objection is resolved or a further order of the Bankruptcy Court is entered providing for payment of such disputed portion.

(b) As soon as practicable following the Effective Date, each holder of a Committee Member Expense Claim shall submit an invoice (detailing reasonable, actual fees and expenses) covering any unbilled period through the Effective Date and return any excess amounts paid on account of such previously submitted estimate. Provided, however, that to receive payment pursuant to this Section 13.4(a), each holder of a Committee Member Expense Claim shall provide reasonable and customary detail (such invoices shall not be required to comply with the U.S. Trustee fee guidelines but shall be sufficiently detailed to enable a determination as to the reasonableness of such fees and expenses (without limiting the right of the various professionals or parties to redact privileged, confidential or sensitive information)) along with or as part of all invoices submitted in support of its respective Committee Member Expense Claim to the Debtors, counsel to the Consenting Noteholders and counsel to the Consenting Lenders. In the event that no Committee Member Expense Claims are paid pursuant to the Plan because this Section 13.4(a) is not operative, Creditors' Committee members (other than the Notes Trustee) shall have the right to file a substantial contribution application on account of such unpaid reasonable, actual fees (provided, with respect to any such substantial contribution application filed by Henry Schein, Inc., that the Claims for reasonable, actual attorneys' fees and expenses incurred by Henry Schein, Inc.'s outside counsel (in connection with the Reorganization Cases) from the Commencement Date through the Effective Date do not exceed the \$100,000 cap), which application the Consenting Noteholders and the Debtors or Reorganized Debtors, as applicable, shall support.

(c) The Debtors or the Reorganized Debtors, on the Effective Date to the extent invoiced, or as soon as reasonably practicable following receipt of invoices post-Effective Date (which invoices shall not be required to comply with the U.S. Trustee fee guidelines but shall be sufficiently detailed to enable a determination as to the reasonableness of such fees and expenses (without limiting the right of the various professionals or parties to redact privileged, confidential or sensitive information)) (and which invoices shall also be provided to the Consenting Lenders), shall pay the Notes Trustee Fee Claims incurred through the Effective Date; provided, however, if the Debtors, the Reorganized Debtors, or the Consenting Lenders, as applicable, and the Notes Trustee cannot agree with respect to the reasonableness of the fees and expenses to be paid, the Debtors or the Reorganized Debtors, as applicable, shall (i) pay the undisputed portion of any invoices submitted with respect to Notes Trustee Fee Claims, (ii) place the disputed amounts of any such invoices in escrow, and (iii) notify the Notes Trustee of any dispute within ten (10) days after the presentation of such invoices. Upon such notification, the Notes Trustee may assert its charging lien pursuant to the terms of the Indentures to pay the disputed and unpaid portion of the Notes Trustee Fee Claims, and/or after the parties have attempted in good faith to resolve any such dispute for at least fifteen (15) days after the notification of the dispute, may submit such dispute for resolution to the Bankruptcy Court; provided, however, that the Bankruptcy Court's review shall be limited to a determination under the reasonableness standard in accordance with the Indentures. Nothing herein (including, without limitation, any release, discharge or injunction provided under the Plan) shall impair, waive, discharge or negatively affect any charging lien for any fees, costs and expenses not paid

pursuant to this Plan and otherwise claimed by the Notes Trustee in accordance with the Indentures.

13.5. *Amendments.*

(a) Preconfirmation Amendment. The Debtors may modify the Plan, subject to the reasonable consent of the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors' Committee (which consents shall not be unreasonably withheld or delayed), and subject to section 1127 of the Bankruptcy Code, at any time prior to the entry of the Confirmation Order provided that the Plan, as modified, and the disclosure statement pertaining thereto meet applicable Bankruptcy Code requirements.

(b) Postconfirmation Amendment Not Requiring Resolicitation. After the entry of the Confirmation Order, the Debtors may modify the Plan, subject to the reasonable consent of the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors' Committee (which consents shall not be unreasonably withheld or delayed), and subject to section 1127 of the Bankruptcy Code, to remedy any defect or omission or to reconcile any inconsistencies in the Plan or in the Confirmation Order, as may be necessary to carry out the purposes and effects of the Plan; provided that the Debtors obtain approval of the Bankruptcy Court for such modification, after notice and a hearing. Any waiver under Section 11.3 of this Plan shall not be considered to be a modification of the Plan.

(c) Postconfirmation/Preconsummation Amendment Requiring Resolicitation. After the Confirmation Date and before substantial consummation of the Plan, the Debtors may modify the Plan, subject to the reasonable consent of the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors' Committee (which consents shall not be unreasonably withheld or delayed), and subject to section 1127 of the Bankruptcy Code, in a way that materially and adversely affects the interests, rights, treatment, or Plan Distributions of a Class of Claims or Interests; provided that: (i) the Plan, as modified, meets applicable Bankruptcy Code requirements; (ii) the Debtors obtain Bankruptcy Court approval for such modification, after notice and a hearing; (iii) such modification is accepted by the holders of at least two-thirds in amount, and more than one-half in number, of Allowed Claims or Interests voting in each Class affected by such modification; and (iv) the Debtors comply with section 1125 of the Bankruptcy Code with respect to the Plan as modified.

13.6. *Revocation or Withdrawal of this Plan.*

The Debtors reserve the right to revoke or withdraw this Plan prior to the Effective Date, subject to the reasonable consent of the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors' Committee (which consents shall not be unreasonably withheld or delayed). To the extent that the Confirmation Order has been entered, the Debtors will seek revocation of the Confirmation Order prior to revoking or withdrawing the Plan. If the Debtors take such action, this Plan shall be deemed null and void.

13.7. *Confirmation Order.*

The Confirmation Order shall, and is hereby deemed to, ratify all transactions effected by the Debtors during the period commencing on the Commencement Date and ending on the Confirmation Date, except for any acts constituting gross negligence, willful misconduct or fraud.

13.8. *Allocation of Plan Distributions Between Principal and Interest.*

To the extent that any Allowed Claim entitled to a distribution under the Plan consists of indebtedness and other amounts (such as accrued but unpaid interest thereon), such distribution shall be allocated first to the principal amount of the Claim (as determined for federal income tax purposes) and then, to the extent the consideration exceeds the principal amount of the Claim, to such other amounts.

13.9. *Severability.*

If, prior to the entry of the Confirmation Order, any term or provision of this Plan is held by the Bankruptcy Court to be invalid, void, or unenforceable, the Bankruptcy Court, at the request of the Debtors, subject to the reasonable consent of the Required Consenting Lenders, the Required Consenting Noteholders and (solely with respect to the Committee Plan Issues) the Creditors' Committee (which consents shall not be unreasonably withheld or delayed), shall have the power to alter and interpret such term or provision to make it valid or enforceable to the maximum extent reasonably practicable, consistent with the original purpose of the term or provision held to be invalid, void, or unenforceable, and such term or provision shall then be applicable as altered or interpreted. Notwithstanding any such holding, alteration, or interpretation, the remainder of the terms and provisions of this Plan will remain in full force and effect and will in no way be affected, impaired, or invalidated by such holding, alteration, or interpretation. The Confirmation Order shall constitute a judicial determination and shall provide that each term and provision of this Plan, as it may have been altered or interpreted in accordance with the foregoing, is valid and enforceable pursuant to its terms.

13.10. *Governing Law.*

Except to the extent the Bankruptcy Code, Bankruptcy Rules, or other federal laws apply, the rights and obligations arising under the Plan shall be governed by the laws of the State of Delaware, without giving effect to principles of conflicts of law.

13.11. *Section 1125(e) of the Bankruptcy Code.*

The Debtors have, and upon confirmation of this Plan shall be deemed to have, solicited acceptances of this Plan in good faith and in compliance with the applicable provisions of the Bankruptcy Code, and the Debtors (and their affiliates, agents, directors, officers, employees, advisors, and attorneys) have participated in good faith and in compliance with the applicable provisions of the Bankruptcy Code in the offer, issuance, sale, and purchase of the securities offered and sold under this Plan, and therefore are not, and on account of such offer, issuance, sale, solicitation, and/or purchase will not be, liable at any time for the violation of any

applicable law, rule, or regulation governing the solicitation of acceptances or rejections of this Plan or offer, issuance, sale, or purchase of the securities offered and sold under this Plan.

13.12. *Time.*

In computing any period of time prescribed or allowed by the Plan, unless otherwise set forth herein or determined by the Bankruptcy Court, the provisions of Bankruptcy Rule 9006 shall apply.

13.13. *Monetary Figures.*

All references in the Plan to monetary figures shall refer to legal currency of the United States of America, unless otherwise expressly provided.

13.14. *Successors and Assigns.*

The rights, benefits, and obligations of any Person named or referred to in the Plan shall be binding upon, and shall inure to the benefit of, the heirs, executors, administrators, successors and/or assigns of such Person.

13.15. *Controlling Documents.*

To the extent any Plan Document is inconsistent with the Plan, the Disclosure Statement, or any other agreement entered into between the Debtors and any party, the such Plan Document shall control. To the extent the Plan is inconsistent with the Disclosure Statement or any other agreement entered into between the Debtors and any party (other than any Plan Document), the Plan controls the Disclosure Statement and any other such agreements. To the extent that the Plan or any Plan Document is inconsistent with the Confirmation Order, the Confirmation Order (and any other orders of the Bankruptcy Court) control the Plan or any Plan Document.

13.16. *Hart-Scott-Rodino Antitrust Improvements Act.*

Any New Common Stock to be distributed under the Plan to an entity required to file a Premerger Notification and Report Form under the Hart-Scott-Rodino Antitrust Improvements Act of 1976, as amended, or any similar state laws or regulations, shall not be distributed until the notification and waiting periods applicable under such Act to such entity shall have expired or been terminated. In the event any applicable notification and waiting periods do not expire without objection, the Debtors or the Reorganized Debtors, as applicable, or their agent shall, in their sole discretion, be entitled to sell such entity's shares of New Common Stock that were to be distributed under the Plan to such entity, and thereafter shall distribute the proceeds of the sale to such entity.

13.17. *Notices.*

All notices or requests in connection with the Plan shall be in writing and will be deemed to have been given when received by mail and addressed to:

Rural/Metro Corporation
9221 E. Via de Ventura
Scottsdale, AZ 85258
Attn: Stephen Farber
Telephone: 800-352-2309

-and-

Willkie Farr & Gallagher LLP
787 Seventh Avenue
New York, New York 10019-6099
Attn: Matthew Feldman, Esq.
Rachel C. Strickland, Esq.
Daniel I. Forman, Esq.
Telephone: (212) 728-8000
Facsimile: (212) 728-8111

13.18. *Payment of Statutory Fees.*

All fees payable pursuant to section 1930 of title 28 of the United States Code, due and payable through the Effective Date shall be paid by the Debtors on or before the Effective Date and amounts due thereafter shall be paid by the Reorganized Debtors in the ordinary course until the entry of a Final Order closing the Reorganization Cases. Any deadline for filing Administrative Expense Claims shall not apply to fees payable pursuant to section 1930 of title 28 of the United States Code.

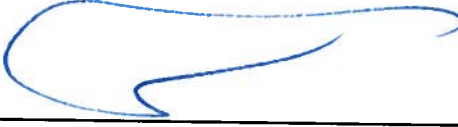
13.19. *Reservation of Rights.*

Except as expressly set forth herein, the Plan shall have no force or effect unless and until the Bankruptcy Court enters the Confirmation Order. None of the filing of the Plan, any statement or provision contained herein, or the taking of any action by the Debtors with respect to the Plan shall be or shall be deemed to be, an admission or waiver of any rights of the Debtors with respect to any Claims or Interests prior to the Effective Date.

Dated: October 31, 2013

Respectfully submitted,

RURAL/METRO CORPORATION
on behalf of itself and its affiliated Debtors


By: _____
Stephen Farber
Executive Vice President and Chief Financial Officer

Counsel:

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(302) 571-6600

Co-Counsel for the Debtors and Debtors in Possession

Schedule 10.1
Rejected Contracts

[to come]

Schedule 10.3

**Cure Amounts for
Assumed Executory Contracts and Unexpired Leases**

[to come]

EXHIBIT A
List of Debtors

The Debtors in these chapter 11 cases, along with the last four digits of each Debtor's federal tax identification number, as applicable, are:

Arizona EMS Holdings, Inc. (AZ) (7244)	Rural/Metro of Brewerton, Inc. (NY) (0912)
Beacon Transportation, Inc. (NY) (4028)	Rural/Metro of California, Inc. (DE) (8164)
Bowers Companies, Inc. (CA) (6465)	Rural/Metro of Central Alabama, Inc. (DE) (5348)
ComTrans Ambulance Service, Inc. (AZ) (6923)	Rural/Metro of Central Colorado, Inc. (DE) (6583)
Corning Ambulance Service, Inc. (NY) (5659)	Rural/Metro of Central Ohio, Inc. (DE) (2407)
Donlock, Ltd. (PA) (0659)	Rural/Metro of Greater Seattle, Inc. (WA) (6902)
E.M.S. Ventures, Inc. (GA) (3254)	Rural/Metro of Indiana, L.P. (DE) (9954)
Eastern Ambulance Service, Inc. (NE) (7359)	Rural/Metro of New York, Inc. (DE) (0083)
Eastern Paramedics, Inc. (DE) (1102)	Rural/Metro of Northern California, Inc. (DE) (3227)
Emergency Medical Transport, Inc. (AZ) (3878)	Rural/Metro of Northern Ohio, Inc. (DE) (8398)
EMS Ventures of South Carolina, Inc. (SC) (4174)	Rural/Metro of Ohio, Inc (DE) (0488)
Gold Cross Ambulance Service of PA, Inc. (OH) (9869)	Rural/Metro of Oregon, Inc. (DE) (3435)
Gold Cross Ambulance Services, Inc. (DE) (4792)	Rural/Metro of Rochester, Inc. (NY) (0148)
Lasalle Ambulance, Inc. (NY) (4422)	Rural/Metro of San Diego, Inc. (CA) (4132)
Medical Emergency Devices and Services (Meds), Inc. (AZ) (2218)	Rural/Metro of Southern California, Inc. (DE) (1679)
Mercury Ambulance Service, Inc. (KY) (8659)	Rural/Metro of Southern Ohio, Inc. (OH) (9303)
Metro Care Corp. (OH) (3994)	Rural/Metro of Tennessee, L.P. (DE) (3714)
National Ambulance & Oxygen Service, Inc. (NY) (9150)	Rural/Metro Operating Company, LLC (DE) (7563)
North Miss. Ambulance Service, Inc. (MS) (4696)	San Diego Medical Services Enterprise, L.L.C. (CA) (4136)
Pacific Ambulance, Inc. (CA) (7781)	Sioux Falls Ambulance, Inc. (SD) (4797)
Professional Medical Transport, Inc. (AZ) (6661)	Southwest Ambulance and Rescue of Arizona, Inc. (AZ) (9229)
R/M Arizona Holdings, Inc. (AZ) (6302)	Southwest Ambulance of Casa Grande, Inc. (AZ) (2807)
R/M Management Co., Inc. (AZ) (3444)	Southwest Ambulance of New Mexico, Inc. (NM) (5701)
R/M of Tennessee G.P., Inc. (DE) (0819)	Southwest Ambulance of Southeastern Arizona, Inc. (AZ) (8415)
R/M of Tennessee L.P., Inc. (DE) (0821)	Southwest Ambulance of Tucson, Inc. (AZ) (3618)
RMC Corporate Center, L.L.C. (AZ) (4546)	Southwest General Services, Inc. (AZ) (7537)
Rural/Metro (Delaware) Inc. (DE) (1572)	SW General Inc. (AZ) (4455)
Rural/Metro Corporation (AZ) (4388)	The Aid Ambulance Company, Inc. (DE) (4432)
Rural/Metro Corporation (DE) (6929)	The Aid Company, Inc. (IN) (8091)
Rural/Metro Corporation of Florida (FL) (4668)	Towns Ambulance Service, Inc. (NY) (8281)
Rural/Metro Corporation of Tennessee (TN) (9245)	Valley Fire Service, Inc. (DE) (6188)
Rural/Metro Fire Dept., Inc. (AZ) (3445)	W & W Leasing Company, Inc. (AZ) (1806)
Rural/Metro Mid-South, L.P. (DE) (4413)	WP Rocket Holdings, Inc. (DE) (9609)

EXHIBIT B

**Amended and Restated Secured Credit Agreement
and Backstop Term Loan**

[to come]

EXHIBIT C

Amended By-laws

[to come]

EXHIBIT D

Amended Certificate

[to come]

EXHIBIT E

Exit LC Facility

[to come]

EXHIBIT F

New Preferred Stock Certificate Designations

[to come]

EXHIBIT G

Registration Rights Agreement

[to come]

EXHIBIT H

Rights Offering Backstop Commitment Agreement

[to come]

EXHIBIT I

Stockholders Agreement

[to come]

EXHIBIT J

Subscription Form

[to come]

EXHIBIT K

Individuals on Board of Directors of Reorganized Debtors

[to come]

EXHIBIT L

Officers of Reorganized Debtors

[to come]

EXHIBIT M

Litigation Trust Agreement

[to come]

EXHIBIT N

Creditor Representative Plan Supplement

[to come]

EXHIBIT O

Cooperation Agreement

[to come]