



## **Fourth Quarter and Full Year 2016 Reconciliation of Non-GAAP Financial Measures**

### Adjusted Operating Income Reconciliation

Adjusted operating income is not a measure of financial performance under generally accepted accounting principles ("GAAP"). The Company believes adjusted operating income provides a relevant measure of operating profitability and a useful basis for evaluating the ongoing operations of the Company. Adjusted operating income is used by the Company to assess operating income before the impact of acquisitions and acquisition-related costs and certain non-cash items. Adjusted operating income is used by the Company as a benchmark for performance and compensation by certain executives. Adjusted operating income should not be considered in isolation or as a substitute for operating income or other profitability data prepared in accordance with GAAP. Adjusted operating income, as presented, may not be comparable to similarly titled measures of other companies. Set forth below is a reconciliation of adjusted operating income from operating income.

Please note: Adjustments were made to third quarter 2016 M&A and acquisition-related costs for the Safety Services and Specialized Agent Services segments. On a consolidated basis, these adjustments totaled \$0.1 million. Full year results shown in the tables below reflect these adjustments.

<b>Reconciliation of Adjusted Operating Income from Operating Income</b>			
<i>Unaudited, in thousands</i>			
	<b>Three Months Ended Dec. 31,</b>		
<b>Consolidated:</b>	<b>2016</b>	<b>2015</b>	<b>% Change</b>
Operating income	\$ 102,690	\$ 104,970	-2.2%
Amortization of acquired intangible assets	16,446	18,977	-13.3%
Share-based compensation	5,459	6,140	-11.1%
Secondary equity offering expense	-	(186)	NM
Significant restructuring	8,423	-	NM
Gain on sale of real estate	(1,101)	-	NM
M&A and acquisition-related costs	375	1,097	-65.8%
Adjusted operating income	<u>\$ 132,292</u>	<u>\$ 130,998</u>	<u>1.0%</u>
Adjusted operating income margin	23.3%	23.0%	
<b>Unified Communications Services:</b>			
Operating income	\$ 69,959	\$ 88,182	-20.7%
Amortization of acquired intangible assets	2,910	3,618	-19.6%
Share-based compensation	3,074	3,399	-9.6%
Secondary equity offering expense	-	(94)	NM
Significant restructuring	5,482	-	NM
M&A and acquisition-related costs	347	483	-28.2%
Adjusted operating income	<u>\$ 81,772</u>	<u>\$ 95,588</u>	<u>-14.5%</u>
Adjusted operating income margin	24.0%	26.7%	
<b>Safety Services:</b>			
Operating income	\$ 16,711	\$ 5,704	193.0%
Amortization of acquired intangible assets	3,625	5,436	-33.3%
Share-based compensation	865	973	-11.1%
Secondary equity offering expense	-	(59)	NM
Significant restructuring	2,373	-	NM
M&A and acquisition-related costs	80	-	NM
Adjusted operating income	<u>\$ 23,654</u>	<u>\$ 12,054</u>	<u>96.2%</u>
Adjusted operating income margin	31.3%	16.5%	
<b>Interactive Services:</b>			
Operating income	\$ 9,068	\$ 6,620	37.0%
Amortization of acquired intangible assets	5,306	4,512	17.6%
Share-based compensation	538	611	-11.9%
Secondary equity offering expense	-	(13)	NM
Significant restructuring	97	-	NM
M&A and acquisition-related costs	(52)	612	NM
Adjusted operating income	<u>\$ 14,957</u>	<u>\$ 12,342</u>	<u>21.2%</u>
Adjusted operating income margin	18.9%	17.3%	
<b>Specialized Agent Services:</b>			
Operating income	\$ 4,642	\$ 6,199	-25.1%
Amortization of acquired intangible assets	4,605	5,411	-14.9%
Share-based compensation	982	1,157	-15.1%
Secondary equity offering expense	-	(19)	NM
Significant restructuring	433	-	NM
Adjusted operating income	<u>\$ 10,662</u>	<u>\$ 12,748</u>	<u>-16.4%</u>
Adjusted operating income margin	14.1%	17.4%	
<b>Corporate Other:</b>			
Operating income (loss)	\$ 2,310	\$ (1,735)	
Secondary equity offering expense	-	(1)	
Gain on sale of real estate	(1,101)	-	
Significant restructuring	38	-	
M&A and acquisition-related costs	-	2	
Adjusted operating income (loss)	<u>\$ 1,247</u>	<u>\$ (1,734)</u>	

<b>Reconciliation of Adjusted Operating Income from Operating Income</b>			
<i>Unaudited, in thousands</i>			
	<b>Year Ended Dec. 31,</b>		
<b>Consolidated:</b>	<b>2016</b>	<b>2015</b>	<b>% Change</b>
Operating income	\$ 444,214	\$ 456,450	-2.7%
Amortization of acquired intangible assets	66,531	68,458	-2.8%
Share-based compensation	25,388	22,925	10.7%
Secondary equity offering expense	-	855	NM
Significant restructuring	8,423	-	NM
Gain on sale of real estate	(14,064)	-	NM
M&A and acquisition-related costs	3,745	3,074	21.8%
Adjusted operating income	<u>\$ 534,237</u>	<u>\$ 551,762</u>	<u>-3.2%</u>
Adjusted operating income margin	23.3%	24.2%	
<b>Unified Communications Services:</b>			
Operating income	\$ 327,195	\$ 377,850	-13.4%
Amortization of acquired intangible assets	13,000	13,414	-3.1%
Share-based compensation	14,330	13,119	9.2%
Secondary equity offering expense	-	153	NM
Significant restructuring	5,482	-	NM
M&A and acquisition-related costs	1,659	485	NM
Adjusted operating income	<u>\$ 361,666</u>	<u>\$ 405,021</u>	<u>-10.7%</u>
Adjusted operating income margin	25.4%	27.6%	
<b>Safety Services:</b>			
Operating income	\$ 54,703	\$ 22,408	144.1%
Amortization of acquired intangible assets	14,139	19,055	-25.8%
Share-based compensation	4,061	3,697	9.8%
Secondary equity offering expense	-	19	NM
Significant restructuring	2,373	-	NM
M&A and acquisition-related costs	3,653	-	NM
Adjusted operating income	<u>\$ 78,929</u>	<u>\$ 45,179</u>	<u>74.7%</u>
Adjusted operating income margin	26.6%	16.1%	
<b>Interactive Services:</b>			
Operating income	\$ 30,631	\$ 25,044	22.3%
Amortization of acquired intangible assets	21,005	16,210	29.6%
Share-based compensation	2,533	2,328	8.8%
Secondary equity offering expense	-	22	NM
Significant restructuring	97	-	NM
M&A and acquisition-related costs	2,122	2,353	-9.8%
Adjusted operating income	<u>\$ 56,388</u>	<u>\$ 45,957</u>	<u>22.7%</u>
Adjusted operating income margin	18.7%	17.3%	
<b>Specialized Agent Services:</b>			
Operating income	\$ 16,438	\$ 30,468	-46.0%
Amortization of acquired intangible assets	18,387	19,779	-7.0%
Share-based compensation	4,464	3,781	18.1%
Secondary equity offering expense	-	31	NM
Significant restructuring	433	-	NM
M&A and acquisition-related costs	(3,689)	150	NM
Adjusted operating income	<u>\$ 36,033</u>	<u>\$ 54,209</u>	<u>-33.5%</u>
Adjusted operating income margin	12.8%	19.6%	
<b>Corporate Other:</b>			
Operating income	\$ 15,247	\$ 680	
Secondary equity offering expense	-	630	
Gain on sale of real estate	(14,064)	-	
Significant restructuring	38	-	
M&A and acquisition-related costs	-	86	
Adjusted operating income	<u>\$ 1,221</u>	<u>\$ 1,396</u>	

### Adjusted Net Income, Adjusted Income from Continuing Operations and Adjusted Earnings per Share Reconciliation

Adjusted net income, adjusted income from continuing operations and adjusted earnings per share (EPS) are non-GAAP measures. The Company believes these measures provide a useful indication of profitability and basis for assessing the operations of the Company without the impact of bond redemption premiums, acquisitions and acquisition-related costs, significant restructuring costs and certain non-cash items. Adjusted net income and adjusted income from continuing operations should not be considered in isolation or as a substitute for net income or other profitability metrics prepared in accordance with GAAP. Adjusted net income and adjusted income from continuing operations, as presented, may not be comparable to similarly titled measures of other companies. The Company utilizes these non-GAAP measures to make decisions about the use of resources, analyze performance, measure management's performance with stated objectives and compensate management relative to the achievement of such objectives. Set forth below is a reconciliation of adjusted income from continuing operations from income from continuing operations and adjusted net income from net income.

Please note: Adjustments were made to third quarter 2016 M&A and acquisition-related costs for the Safety Services and Specialized Agent Services segments. On a consolidated basis, these adjustments totaled \$0.1 million. Full year results shown in the tables below reflect these adjustments.

**Reconciliation of Adj. Income from Continuing Ops from Income from Continuing Ops  
and Adjusted Net Income from Net Income**

<i>Unaudited, in thousands except per share data</i>			
<b>CONTINUING OPERATIONS</b>	<b>Three Months Ended Dec. 31,</b>		
	<b>2016</b>	<b>2015</b>	<b>% Change</b>
Income from continuing operations	\$ 68,320	\$ 42,340	61.4%
Amortization of acquired intangible assets	16,446	18,977	
Amortization of deferred financing costs	1,834	6,928	
Interest rate swap ineffectiveness	(1,130)	-	
Share-based compensation	5,459	6,140	
Secondary equity offering expense	-	(186)	
Gain on sale of real estate	(1,101)	-	
Significant restructuring	8,423	-	
M&A and acquisition-related costs	375	1,097	
Pre-tax total	30,306	32,956	
Income tax expense on adjustments	11,049	11,630	
Foreign entity restructuring tax benefit	(23,046)	-	
Adjusted income from continuing operations	\$ 64,531	\$ 63,666	1.4%
Diluted shares outstanding	84,967	84,809	
Adjusted EPS from continuing operations - diluted	\$ 0.76	\$ 0.75	1.3%
<b>DISCONTINUED OPERATIONS</b>	<b>Three Months Ended Dec. 31,</b>		
	<b>2016</b>	<b>2015</b>	
Income from discontinued operations	\$ -	\$ 19,935	
Adjusted income from discontinued operations	\$ -	\$ 19,935	
Diluted shares outstanding	84,967	84,809	
Adjusted EPS from discontinued operations - diluted	\$ -	\$ 0.24	
<b>CONSOLIDATED</b>	<b>Three Months Ended Dec. 31,</b>		
	<b>2016</b>	<b>2015</b>	<b>% Change</b>
Net income	\$ 68,320	\$ 62,275	9.7%
Amortization of acquired intangible assets	16,446	18,977	
Amortization of deferred financing costs	1,834	6,928	
Interest rate swap ineffectiveness	(1,130)	-	
Share-based compensation	5,459	6,140	
Secondary equity offering expense	-	(186)	
Gain on sale of real estate	(1,101)	-	
Significant restructuring	8,423	-	
M&A and acquisition-related costs	375	1,097	
Pre-tax total	30,306	32,956	
Income tax expense on adjustments	11,049	11,630	
Foreign entity restructuring tax benefit	(23,046)	-	
Adjusted net income	\$ 64,531	\$ 83,601	-22.8%
Diluted shares outstanding	84,967	84,809	
Adjusted EPS - diluted	\$ 0.76	\$ 0.99	-23.2%

**Reconciliation of Adj. Income from Continuing Ops from Income from Continuing Ops  
and Adjusted Net Income from Net Income**

<i>Unaudited, in thousands except per share data</i>			
<b>CONTINUING OPERATIONS</b>	<b>Year Ended Dec. 31,</b>		
	<b>2016</b>	<b>2015</b>	<b>% Change</b>
Income from continuing operations	\$ 193,389	\$ 190,916	1.3%
Amortization of acquired intangible assets	66,531	68,458	
Amortization of deferred financing costs	48,342	21,945	
Interest rate swap ineffectiveness	(1,130)	-	
Share-based compensation	25,388	22,925	
Secondary equity offering expense	-	855	
Gain on sale of real estate	(14,064)	-	
Significant restructuring	8,423	-	
M&A and acquisition-related costs	3,745	3,074	
Pre-tax total	137,235	117,257	
Income tax expense on adjustments	50,634	42,306	
Foreign entity restructuring tax benefit	(23,046)	-	
Adjusted income from continuing operations	<u>\$ 256,944</u>	<u>\$ 265,867</u>	<u>-3.4%</u>
Diluted shares outstanding	84,599	85,394	
Adjusted EPS from continuing operations - diluted	\$ 3.04	\$ 3.11	-2.3%
<b>DISCONTINUED OPERATIONS</b>	<b>Year Ended Dec. 31,</b>		
	<b>2016</b>	<b>2015</b>	
Income from discontinued operations	\$ -	\$ 50,924	
Amortization of acquired intangible assets	-	41	
Share-based compensation	-	1,576	
M&A and acquisition-related costs	-	386	
Pre-tax total	-	2,003	
Income tax benefit on adjustments	-	(15)	
Adjusted income from discontinued operations	<u>\$ -</u>	<u>\$ 52,942</u>	
Diluted shares outstanding	84,599	85,394	
Adjusted EPS from discontinued operations - diluted	\$ -	\$ 0.62	
<b>CONSOLIDATED</b>	<b>Year Ended Dec. 31,</b>		
	<b>2016</b>	<b>2015</b>	<b>% Change</b>
Net income	\$ 193,389	\$ 241,840	-20.0%
Amortization of acquired intangible assets	66,531	68,499	
Amortization of deferred financing costs	48,342	21,945	
Interest rate swap ineffectiveness	(1,130)	-	
Share-based compensation	25,388	24,501	
Secondary equity offering expense	-	855	
Gain on sale of real estate	(14,064)	-	
Significant restructuring	8,423	-	
M&A and acquisition-related costs	3,745	3,460	
Pre-tax total	137,235	119,260	
Income tax expense on adjustments	50,634	42,291	
Foreign entity restructuring tax benefit	(23,046)	-	
Adjusted net income	<u>\$ 256,944</u>	<u>\$ 318,809</u>	<u>-19.4%</u>
Diluted shares outstanding	84,599	85,394	
Adjusted EPS - diluted	\$ 3.04	\$ 3.73	-18.5%

### Free Cash Flow Reconciliation

The Company believes free cash flow provides a relevant measure of liquidity and a useful basis for assessing the Company's ability to fund its activities, including the financing of acquisitions, debt service, stock repurchases and distribution of earnings to shareholders. Free cash flow is calculated as cash flows from operating activities less cash capital expenditures. Free cash flow is not a measure of financial performance under GAAP. Free cash flow should not be considered in isolation or as a substitute for cash flows from operating activities or other liquidity measures prepared in accordance with GAAP. Free cash flow, as presented, may not be comparable to similarly titled measures of other companies. Set forth below is a reconciliation of free cash flow from cash flows from operating activities.

Reconciliation of Free Cash Flow from Operating Cash Flow						
<i>Unaudited, in thousands</i>						
<b>CONTINUING OPERATIONS</b>	<b>Three Months Ended Dec. 31,</b>			<b>Year Ended Dec. 31,</b>		
	<b>2016</b>	<b>2015</b>	<b>% Change</b>	<b>2016</b>	<b>2015</b>	<b>% Change</b>
Cash flows from operating activities	\$ 126,673	\$ 127,547	-0.7%	\$ 428,275	\$ 410,768	4.3%
Cash capital expenditures	27,278	40,628	-32.9%	126,581	136,810	-7.5%
Free cash flow	<u>\$ 99,395</u>	<u>\$ 86,919</u>	<u>14.4%</u>	<u>\$ 301,694</u>	<u>\$ 273,958</u>	<u>10.1%</u>
<b>DISCONTINUED OPERATIONS</b>	<b>Three Months Ended Dec. 31,</b>			<b>Year Ended Dec. 31,</b>		
	<b>2016</b>	<b>2015</b>		<b>2016</b>	<b>2015</b>	
Cash flows from (used in) operating activities	\$ -	\$ 15,419		\$ -	\$ 7,222	
Cash capital expenditures	-	-		-	1,930	
Free cash flow	<u>\$ -</u>	<u>\$ 15,419</u>		<u>\$ -</u>	<u>\$ 5,292</u>	
<b>CONSOLIDATED</b>	<b>Three Months Ended Dec. 31,</b>			<b>Year Ended Dec. 31,</b>		
	<b>2016</b>	<b>2015</b>	<b>% Change</b>	<b>2016</b>	<b>2015</b>	<b>% Change</b>
Cash flows from operating activities	\$ 126,673	\$ 142,966	-11.4%	\$ 428,275	\$ 417,990	2.5%
Cash capital expenditures	27,278	40,628	-32.9%	126,581	138,740	-8.8%
Free cash flow	<u>\$ 99,395</u>	<u>\$ 102,338</u>	<u>-2.9%</u>	<u>\$ 301,694</u>	<u>\$ 279,250</u>	<u>8.0%</u>

### EBITDA and Adjusted EBITDA Reconciliation

The common definition of EBITDA is "Earnings Before Interest Expense, Taxes, Depreciation and Amortization." In evaluating liquidity and performance, the Company uses "Adjusted EBITDA." The Company defines Adjusted EBITDA as earnings before interest expense, share-based compensation, taxes, depreciation and amortization, gain on assets held for sale and transaction costs. EBITDA and Adjusted EBITDA are not measures of financial performance or liquidity under GAAP. Although the Company uses Adjusted EBITDA as a measure of its liquidity and performance, the use of Adjusted EBITDA is limited because it does not include certain material costs, such as depreciation, amortization and interest, necessary to operate the business. EBITDA and Adjusted EBITDA should not be considered in isolation or as a substitute for net income, cash flow from operating activities or other income or cash flow data prepared in accordance with GAAP. Adjusted EBITDA, as presented, may not be comparable to similarly titled measures of other companies. Adjusted EBITDA is presented here as the Company understands investors use it as a measure of its historical ability to service debt and compliance with covenants in its senior credit facilities. Further, Adjusted EBITDA is presented here as the Company uses it to measure its performance and to conduct and evaluate its business during its regular review of operating results for the periods presented. Set forth below is a reconciliation of EBITDA and Adjusted EBITDA from cash flow from operating activities and net income.

Please note: Adjustments were made to third quarter 2016 M&A and acquisition-related costs for the Safety Services and Specialized Agent Services segments. On a consolidated basis, these

adjustments totaled \$0.1 million. Full year results shown in the tables below reflect these adjustments.

<b>Reconciliation of EBITDA and Adjusted EBITDA from Operating Cash Flow</b>				
<i>Unaudited, in thousands</i>				
<b>CONTINUING OPERATIONS</b>	<b>Three Months Ended Dec. 31,</b>		<b>Year Ended Dec. 31,</b>	
	<b>2016</b>	<b>2015</b>	<b>2016</b>	<b>2015</b>
Cash flows from operating activities	\$ 126,673	\$ 127,547	\$ 428,275	\$ 410,768
Income tax expense (benefit)	(1,193)	23,093	66,423	107,757
Deferred income tax benefit (expense)	14,828	(14,888)	30,211	(8,930)
Interest expense and other financing charges	35,685	41,236	186,160	158,356
Provision for share-based compensation	(5,459)	(6,140)	(25,388)	(22,925)
Amortization of deferred financing costs	(1,834)	(6,928)	(48,342)	(21,945)
Gain on sale of real estate	1,101	-	14,064	-
Other	(322)	(448)	(1,512)	(672)
Changes in operating assets and liabilities, net of business acquisitions	(17,722)	(5,454)	(9,237)	26,884
<b>EBITDA</b>	<b>151,757</b>	<b>158,018</b>	<b>640,654</b>	<b>649,293</b>
Provision for share-based compensation	5,459	6,140	25,388	22,925
Secondary equity offering expense	-	(186)	-	855
Gain on sale of real estate	(1,101)	-	(14,064)	-
Significant restructuring	8,423	-	8,423	-
M&A and acquisition-related costs	375	1,097	3,745	3,074
<b>Adjusted EBITDA</b>	<b>\$ 164,913</b>	<b>\$ 165,069</b>	<b>\$ 664,146</b>	<b>\$ 676,147</b>
Cash flows from operating activities	\$ 126,673	\$ 127,547	\$ 428,275	\$ 410,768
Cash flows used in investing activities	\$ (41,196)	\$ (118,651)	\$ (108,263)	\$ (232,433)
Cash flows used in financing activities	\$ (88,376)	\$ (23,453)	\$ (311,911)	\$ (388,243)
<b>DISCONTINUED OPERATIONS</b>	<b>Three Months Ended Dec. 31,</b>	<b>Year Ended Dec. 31,</b>		
	<b>2016</b>	<b>2015</b>	<b>2016</b>	<b>2015</b>
Cash flows from operating activities	\$ -	\$ 15,419	\$ -	\$ 7,222
Income tax expense	-	(19,717)	-	(372)
Deferred income tax expense	-	4,516	-	2,223
Provision for share-based compensation	-	-	-	(1,576)
Other	-	-	-	29,596
Changes in operating assets and liabilities, net of business acquisitions	-	-	-	13,500
<b>EBITDA</b>	<b>-</b>	<b>218</b>	<b>-</b>	<b>50,593</b>
Provision for share-based compensation	-	-	-	1,576
M&A and acquisition-related costs	-	-	-	386
Gain on sale of business	-	(182)	-	(46,838)
<b>Adjusted EBITDA</b>	<b>\$ -</b>	<b>\$ 36</b>	<b>\$ -</b>	<b>\$ 5,717</b>
Cash flows used in operating activities	\$ -	\$ 15,419	\$ -	\$ 7,222
Cash flows from investing activities	\$ -	\$ -	\$ -	\$ 275,815
Cash flows used in financing activities	\$ -	\$ -	\$ -	\$ -



**Reconciliation of EBITDA and Adjusted EBITDA from Operating Cash Flow, cont.**

<b>CONSOLIDATED</b>	<b>Three Months Ended Dec. 31,</b>		<b>Year Ended Dec. 31,</b>	
	<b>2016</b>	<b>2015</b>	<b>2016</b>	<b>2015</b>
Cash flows from operating activities	\$ 126,673	\$ 142,966	\$ 428,275	\$ 417,990
Income tax expense (benefit)	(1,193)	3,376	66,423	107,385
Deferred income tax expense	14,828	(10,372)	30,211	(6,707)
Interest expense and other financing charges	35,685	41,236	186,160	158,356
Provision for share-based compensation	(5,459)	(6,140)	(25,388)	(24,501)
Amortization of deferred financing costs	(1,834)	(6,928)	(48,342)	(21,945)
Gain on sale of real estate	1,101	-	14,064	-
Other	(322)	(448)	(1,512)	28,924
Changes in operating assets and liabilities, net of business acquisitions	(17,722)	(5,454)	(9,237)	40,384
<b>EBITDA</b>	<b>151,757</b>	<b>158,236</b>	<b>640,654</b>	<b>699,886</b>
Provision for share-based compensation	5,459	6,140	25,388	24,501
Secondary equity offering expense	-	(186)	-	855
Gain on sale of real estate	(1,101)	-	(14,064)	-
Significant restructuring	8,423	-	8,423	-
M&A and acquisition-related costs	375	1,097	3,745	3,460
Gain on sale of business	-	(182)	-	(46,838)
<b>Adjusted EBITDA</b>	<b>\$ 164,913</b>	<b>\$ 165,105</b>	<b>\$ 664,146</b>	<b>\$ 681,864</b>
<b>CONSOLIDATED</b>				
Cash flows from operating activities	\$ 126,673	\$ 142,966	\$ 428,275	\$ 417,990
Cash flows from (used in) investing activities	\$ (41,196)	\$ (118,651)	\$ (108,263)	\$ 43,382
Cash flows used in financing activities	\$ (88,376)	\$ (23,453)	\$ (311,911)	\$ (388,243)

**Reconciliation of EBITDA and Adjusted EBITDA from Net Income**

<i>Unaudited, in thousands</i>				
<b>CONTINUING OPERATIONS</b>	<b>Three Months Ended Dec. 31,</b>		<b>Year Ended Dec. 31,</b>	
	<b>2016</b>	<b>2015</b>	<b>2016</b>	<b>2015</b>
Income from continuing operations	\$ 68,320	\$ 42,340	\$ 193,389	\$ 190,916
Interest expense and other financing charges	35,685	41,236	186,160	158,356
Depreciation and amortization	48,945	51,349	194,682	192,264
Income tax expense (benefit)	(1,193)	23,093	66,423	107,757
<b>EBITDA</b>	<b>151,757</b>	<b>158,018</b>	<b>640,654</b>	<b>649,293</b>
Provision for share-based compensation	5,459	6,140	25,388	22,925
Secondary equity offering expense	-	(186)	-	855
Gain on sale of real estate	(1,101)	-	(14,064)	-
Significant restructuring	8,423	-	8,423	-
M&A and acquisition-related costs	375	1,097	3,745	3,074
<b>Adjusted EBITDA</b>	<b>\$ 164,913</b>	<b>\$ 165,069</b>	<b>\$ 664,146</b>	<b>\$ 676,147</b>
<b>DISCONTINUED OPERATIONS</b>				
<b>DISCONTINUED OPERATIONS</b>	<b>Three Months Ended Dec. 31,</b>		<b>Year Ended Dec. 31,</b>	
	<b>2016</b>	<b>2015</b>	<b>2016</b>	<b>2015</b>
Income from discontinued operations	\$ -	\$ 19,935	\$ -	\$ 50,924
Depreciation and amortization	-	-	-	41
Income tax expense	-	(19,717)	-	(372)
<b>EBITDA</b>	<b>-</b>	<b>218</b>	<b>-</b>	<b>50,593</b>
Provision for share-based compensation	-	-	-	1,576
M&A and acquisition-related costs	-	-	-	386
Gain on sale of business	-	(182)	-	(46,838)
<b>Adjusted EBITDA</b>	<b>\$ -</b>	<b>\$ 36</b>	<b>\$ -</b>	<b>\$ 5,717</b>
<b>CONSOLIDATED</b>				
<b>CONSOLIDATED</b>	<b>Three Months Ended Dec. 31,</b>		<b>Year Ended Dec. 31,</b>	
	<b>2016</b>	<b>2015</b>	<b>2016</b>	<b>2015</b>
Net income	\$ 68,320	\$ 62,275	\$ 193,389	\$ 241,840
Interest expense and other financing charges	35,685	41,236	186,160	158,356
Depreciation and amortization	48,945	51,349	194,682	192,305
Income tax expense (benefit)	(1,193)	3,376	66,423	107,385
<b>EBITDA</b>	<b>151,757</b>	<b>158,236</b>	<b>640,654</b>	<b>699,886</b>
Provision for share-based compensation	5,459	6,140	25,388	24,501
Secondary equity offering expense	-	(186)	-	855
Gain on sale of real estate	(1,101)	-	(14,064)	-
Significant restructuring	8,423	-	8,423	-
M&A and acquisition-related costs	375	1,097	3,745	3,460
Gain on sale of business	-	(182)	-	(46,838)
<b>Adjusted EBITDA</b>	<b>\$ 164,913</b>	<b>\$ 165,105</b>	<b>\$ 664,146</b>	<b>\$ 681,864</b>

## Non-GAAP Metrics used in 2017 Guidance

Ranges are shown for each line item. Totals may not foot.

<i>In millions except per share amounts</i>		
<b>Reconciliation of Adjusted EBITDA from Operating Income</b>		
	<b>2017 Guidance</b>	
	Min (low)	Max (high)
Operating income	\$ 413	- \$ 446
Depreciation and amortization	195	- 196
Other income	2	- 2
<b>EBITDA</b>	<b>\$ 610</b>	<b>- \$ 644</b>
Provision for share-based compensation	27	- 27
M&A and acquisition-related costs	2	- 2
<b>Adjusted EBITDA</b>	<b>\$ 639</b>	<b>- \$ 672</b>
<b>Reconciliation of Adj. Operating Income from Operating Income</b>		
	<b>2017 Guidance</b>	
	Min (low)	Max (high)
Operating income	\$ 413	- \$ 446
Amortization of acquired intangible assets	57	- 57
Share-based compensation	27	- 27
M&A and acquisition-related costs	2	- 2
<b>Adjusted operating income</b>	<b>\$ 500</b>	<b>- \$ 532</b>
<b>Reconciliation of Adj. Net Income and Adj. EPS from Net Income</b>		
	<b>2017 Guidance</b>	
	Min (low)	Max (high)
Net income	\$ 175	- \$ 196
Amortization of acquired intangible assets	57	- 57
Amortization of deferred financing costs	8	- 8
Share-based compensation	27	- 27
M&A and acquisition-related costs	2	- 2
Pre-tax total	269	- 290
Income tax expense on adjustments	(35)	- (35)
<b>Adjusted net income</b>	<b>\$ 234</b>	<b>- \$ 255</b>
<b>Adjusted EPS - diluted</b>	<b>\$ 2.76</b>	<b>- \$ 3.00</b>