



Creating Value Through Corporate Restructuring: Case Studies in Bankruptcies, Buyouts, and Breakups

By Stuart C. Gilson

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An updated look at how corporate restructuring really works

Stuart Gilson is one of the leading corporate restructuring experts in the United States, teaching thousands of students and consulting with numerous companies. Now, in the second edition of this bestselling book, Gilson returns to present new insight into corporate restructuring.

Through real-world case studies that involve some of the most prominent restructurings of the last ten years, and highlighting the increased role of hedge funds in distressed investing, you'll develop a better sense of the restructuring process and how it can truly create value. In addition to "classic" buyout and structuring case studies, this second edition includes coverage of Delphi, General Motors, the Finova Group and Warren Buffett, Kmart and Sears, Adelphia Communications, Seagate Technology, Dupont-Conoco, and even the Eurotunnel debt restructuring.

- Covers corporate bankruptcy reorganization, debt workouts, "vulture" investing, equity spin-offs, asset divestitures, and much more
- Addresses the effect of employee layoffs and corporate downsizing
- Examines how companies allocate value and when a corporation should "pull the trigger"

From hedge funds to financial fraud to subprime busts, this second edition offers a rare look at some of the most innovative and controversial restructurings ever.

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Editorial Review

Review

"With the number of corporate bond defaults up sharply over the lows of the middle-to-late 1990s, *Creating Value through Corporate Restructuring: Case Studies in Bankruptcies, Buyouts, and Breakups* (John Wiley & Sons, Inc.) is reaching the market at an apt moment. The book, which is written by Harvard Business School Professor Stuart Gilson, employs the case study method to examine the restructuring of the claims of creditors, shareholders, and employees. Of greatest interest to high yield and distressed investors is the section on financial distress, which studies such familiar companies as Continental Airlines, Flagstar Companies, The Loewen Group, and National Convenience Stores. Gilson also provides a market survey of distressed investing, exploring such nuances as prepackaged bankruptcy, "bondmail" (gaining control of a class of debt to block approval of a reorganization plan), exit strategies, tax issues, and disqualification of votes on a bankruptcy reorganization plan. *Creating Value through Corporate Restructuring* also addresses company overhauls that occur outside the context of potential or actual bankruptcy. Techniques include issuance of tracking stock, spin-offs, layoffs, plant closings, revisions of employee retirement benefits, and mergers. Gilson maintains a global perspective, incorporating cases not only from the United States, but also from Germany and Thailand."-- High Yield, a Merrill publication by Marty Fridson

"... Stuart Gilson, of the Harvard Business School, has managed to write a book important to everybody in the distressed market that is also quite enjoyable. His prose is fluid and succinct and a pleasure to read. . . The text covers 13 corporate restructurings focusing on debt workouts, vulture investing, equity spinoffs, tracking stock, asset divestitures, employee layoffs, corporate downsizing, M & A, HLTs, wage give-backs, employee stock buyouts, and the restructuring of employee benefit plans. . . . this is an especially valuable text for anybody working in the distressed market." (Turnarounds & Workouts Magazine, Review by David M. Henderson)

Gilson's book provides a meaningful framework for analyzing any restructuring and a guide to various tools and additional references....Detailed exhibits at the end of each chapter provide the hard, quantifiable financial and industry data that management and stakeholders must interpret to plan, negotiate, and execute a restructuring. The exhibits are especially insightful and provide examples of alternatives for presenting relevant factual information on complex restructurings. (The Journal of Corporate Renewal)

Review

"Gilson reminds readers that the devil is truly in the details, filling the 516-page text with real and specific financial data, flow charts, and statistics to illuminate each case. A portable version of Gilson's course, *Creating Value through Corporate Restructuring* gives readers the chance to learn the intricacies of this increasingly critical management process in today's volatile business climate." (The Harvard Business School Bulletin, December 2001)

?The information provided in Gilson's book is the next best thing to being there. For those of us who are outside the major industrial and business centers and deal with smaller corporate bankruptcies, the book provides a useful source of information for creative solutions. The level of detail in the book is exceptional. . . Gilson gives a sense of the maneuvering that occurs behind the scenes in every workout and bankruptcy case.? (American Bankruptcy Institute Journal)

From the Publisher

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Mark Wolf:

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