

MARRIOTT INTERNATIONAL, INC.

Non-GAAP Financial Measures

In our press release and schedules, and on the related conference call, we report certain financial measures that are not prescribed or authorized by United States generally accepted accounting principles ("GAAP"). We discuss management's reasons for reporting these non-GAAP measures below, and the press release schedules reconcile the most directly comparable GAAP measure to each non-GAAP measure that we refer to (identified by a double asterisk on the preceding pages). Although management evaluates and presents these non-GAAP measures for the reasons described below, please be aware that these non-GAAP measures are not alternatives to revenue, operating income, income from continuing operations, net income, earnings per share or any other comparable operating measure prescribed by GAAP. In addition, these non-GAAP financial measures may be calculated and/or presented differently than measures with the same or similar names that are reported by other companies, and as a result, the non-GAAP measures we report may not be comparable to those reported by others.

2008 Results as Adjusted. Management evaluates non-GAAP measures that exclude the impact of restructuring costs and other charges incurred in the 2008 fourth quarter and certain tax expenses incurred throughout 2008 because those non-GAAP measures allow for period-over-period comparisons of our on-going core operations before material charges. These non-GAAP measures also facilitate management's comparison of results from our on-going operations before material charges with results from other lodging companies.

During the latter part of 2008 and particularly the fourth quarter, we experienced a significant decline in demand for hotel rooms both domestically and internationally due, in part, to the failures and near failures of several large financial service companies and the dramatic downturn in the economy. Our capital intensive Timeshare business was also hurt by the downturn in market conditions and particularly, the significant deterioration in the credit markets, which resulted in our decision not to complete a note sale in the fourth quarter of 2008. These declines resulted in reduced management and franchise fees, cancellation of development projects, reduced timeshare contract sales, and anticipated losses under guarantees and loans. We responded by implementing various cost saving measures, which resulted in aggregate fourth quarter 2008 restructuring costs of \$55 million. We also incurred other fourth quarter charges totaling \$137 million, including charges and reserves associated with guarantees, loans, Timeshare inventory, accounts receivable, contract cancellation allowances, valuation of Timeshare residual interests, hedge ineffectiveness, and asset impairments.

Certain tax expenses incurred in the fourth quarter or throughout 2008, as applicable, include: (1) fourth quarter income tax expense totaling \$7 million primarily due to prior years' tax adjustments; (2) third quarter income tax expense totaling \$29 million primarily related to an unfavorable court decision involving a tax planning transaction associated with a 1994 sale transaction; (3) second quarter income tax expense totaling \$12 million primarily due to prior years' tax adjustments; and (4) second quarter income tax expense totaling \$24 million related to the tax treatment of funds received from foreign subsidiaries.

2007 Results as Adjusted. Management evaluates non-GAAP measures that exclude the charge associated with the 2007 settlement of issues raised during the IRS' and Department of Labor's examination of the employee stock ownership plan ("ESOP") feature of our Employees' Profit Sharing, Retirement and Savings Plan and Trust, including adjusted earnings per share and adjusted earnings before interest, taxes, depreciation and amortization, because these measures allow for period-over-period comparisons for our on-going operations before material charges. These non-GAAP measures also facilitate management's comparison of results from our on-going operations before material charges with those of other lodging companies. The settlement resulted in an after-tax charge of \$54 million in the second quarter of 2007 reflecting \$35 million of excise taxes (impacting general, administrative, and other expenses), \$13 million of interest expense on those excise taxes and \$6 million of income tax expense primarily reflecting additional interest.

Earnings Before Interest, Taxes, Depreciation and Amortization. Earnings before interest, taxes, depreciation and amortization ("EBITDA") reflects earnings excluding the impact of interest expense, tax expense, depreciation and amortization. Management considers EBITDA to be an indicator of operating performance because it can be used to measure our ability to service debt, fund capital expenditures, and expand our business. EBITDA is used by analysts, lenders, investors and others, as well as by us, to evaluate companies because it excludes certain items that can vary widely across different industries or among companies within the same industry. For example, interest expense can be dependent on a company's capital structure, debt levels and credit ratings. Accordingly, the impact of interest expense on earnings can vary significantly among companies. The tax positions of companies can also vary because of their differing abilities to take advantage of tax benefits and because of the tax policies of the jurisdictions in which they operate. As a result, effective tax rates and tax expense can vary considerably among companies. EBITDA also excludes depreciation and amortization because companies utilize productive assets of different ages and use different methods of both acquiring and depreciating productive assets. These differences can result in considerable variability in the relative costs of productive assets and the depreciation and amortization expense among companies.

Adjusted EBITDA. Management also evaluates adjusted EBITDA which excludes: (1) the \$192 million of 2008 fourth quarter restructuring costs and other charges; (2) certain tax expense items incurred throughout 2008; (3) the synthetic fuel business for 2007; and (4) the \$35 million 2007 charge for excise taxes associated with the ESOP settlement. Management evaluates non-GAAP measures which exclude the impact of the synthetic fuel business, which was discontinued in 2007 and which did not relate to our core lodging business, because those measures allow for period-over-period comparisons of our on-going core lodging operations and those measures facilitate management's comparison of our results with those of other lodging companies. Management excludes the excise taxes associated with the 2007 ESOP settlement, the restructuring costs and other charges incurred in the 2008 fourth quarter and certain tax expenses incurred in 2008 for the reasons noted above under "2008 Results as Adjusted" and "2007 Results as Adjusted."

MARRIOTT INTERNATIONAL, INC.
CONSOLIDATED STATEMENTS OF INCOME
(in millions, except per share amounts)

	<u>Adjustments</u>			As Adjusted 17 Weeks Ended January 2, 2009**	As Reported 16 Weeks Ended December 28, 2007	Percent Better/ (Worse) Adjusted 2008 vs. 2007 As Reported
	As Reported 17 Weeks Ended January 2, 2009	Restructuring Costs & Other Charges	Certain Tax Items			
REVENUES						
Base management fees	\$ 183	\$ -	\$ -	\$ 183	\$ 203	(10)
Franchise fees	137	-	-	137	136	1
Incentive management fees	82	-	-	82	126	(35)
Owned, leased, corporate housing and other revenue ¹	376	-	-	376	416	(10)
Timeshare sales and services ²	325	61	-	386	536	(28)
Cost reimbursements ³	<u>2,681</u>	<u>-</u>	<u>-</u>	<u>2,681</u>	<u>2,672</u>	<u>-</u>
Total Revenues	3,784	61	-	3,845	4,089	(6)
OPERATING COSTS AND EXPENSES						
Owned, leased and corporate housing - direct ⁴	331	-	-	331	351	6
Timeshare - direct	373	3	-	376	410	8
Reimbursed costs	2,681	-	-	2,681	2,672	-
Restructuring costs ⁵	55	(55)	-	-	-	*
General, administrative and other ⁶	270	(32)	-	238	250	5
Total Expenses	3,710	(84)	-	3,626	3,683	2
OPERATING INCOME	74	145	-	219	406	(46)
Gains and other income (includes gains on debt extinguishment of \$28M) ⁷	19	9	-	28	20	40
Interest expense	(50)	-	-	(50)	(57)	12
Interest income	11	-	-	11	12	(8)
(Provision for) reversal of loan losses	(22)	22	-	-	(17)	100
Equity in earnings (losses) ⁸	<u>(11)</u>	<u>16</u>	<u>-</u>	<u>5</u>	<u>6</u>	<u>(17)</u>
INCOME FROM CONTINUING OPERATIONS BEFORE INCOME TAXES AND MINORITY INTEREST	21	192	-	213	370	(42)
Provision for income taxes	(33)	(68)	7	(94)	(134)	30
Minority interest, net of tax	<u>2</u>	<u>-</u>	<u>-</u>	<u>2</u>	<u>-</u>	<u>*</u>
INCOME / (LOSS) FROM CONTINUING OPERATIONS	(10)	124	7	121	236	(49)
Discontinued operations - Synthetic Fuel, net of tax ⁹	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>(60)</u>	<u>100</u>
NET INCOME / (LOSS)	\$ (10)	\$ 124	\$ 7	\$ 121	\$ 176	(31)
EARNINGS PER SHARE - Basic						
Earnings from continuing operations ¹⁰	\$ (0.03)	\$ 0.35	\$ 0.02	\$ 0.35	\$ 0.65	(46)
Earnings from discontinued operations ⁹	-	-	-	-	(0.17)	100
Earnings per share ¹⁰	<u>\$ (0.03)</u>	<u>\$ 0.35</u>	<u>\$ 0.02</u>	<u>\$ 0.35</u>	<u>\$ 0.48</u>	<u>(27)</u>
EARNINGS PER SHARE - Diluted						
Earnings from continuing operations	\$ (0.03)	\$ 0.35	\$ 0.02	\$ 0.34	\$ 0.62	(45)
Earnings from discontinued operations ⁹	-	-	-	-	(0.16)	100
Earnings per share	<u>\$ (0.03)</u>	<u>\$ 0.35</u>	<u>\$ 0.02</u>	<u>\$ 0.34</u>	<u>\$ 0.46</u>	<u>(26)</u>
Basic Shares	349.3	349.3	349.3	349.3	363.6	
Diluted Shares	349.3	359.4	359.4	359.4	383.1	

* Percent can not be calculated.

** Denotes non-GAAP financial measures. Please see page A-16 for additional information about our reasons for providing these alternative financial measures and the limitations on their use.

¹ - *Owned, leased, corporate housing and other revenue* includes revenue from the properties we own or lease, revenue from our corporate housing business, termination fees and other revenue.

² - *Timeshare sales and services* includes total timeshare revenue except for base management fees, cost reimbursements, real estate gains and joint venture earnings.

Timeshare sales and services includes gains on the sale of timeshare note receivable securitizations.

³ - *Cost reimbursements* include reimbursements from lodging properties for Marriott-funded operating expenses.

⁴ - *Owned, leased and corporate housing - direct* expenses include operating expenses related to our owned or leased hotels, including lease payments, pre-opening expenses and depreciation, plus expenses related to our corporate housing business.

⁵ - *Restructuring costs* include the write-off of capitalized development costs related to certain projects that we discontinued, severance charges as a result of Timeshare and above-property personnel reductions, and facilities exit costs arising from the reduction in personnel.

⁶ - *General, administrative and other* expenses include the overhead costs allocated to our segments, and our corporate overhead costs and general expenses.

⁷ - *Gains and other income* includes gains and losses on the sale of real estate, gains on note sales or repayments (except timeshare note securitization gains), sale of joint ventures, gains on debt extinguishment and income from cost method joint ventures.

⁸ - *Equity in earnings (losses)* includes our equity in earnings (losses) of unconsolidated equity method joint ventures.

⁹ - *Discontinued operations* relates to our Synthetic Fuel business which was shut down and substantially all the assets liquidated at December 28, 2007.

¹⁰ - *Earnings per share* as reported plus earnings per share from Restructuring Costs & Other Charges and Certain Tax Items may not sum to earnings per share as adjusted due to rounders.

MARRIOTT INTERNATIONAL, INC.
CONSOLIDATED STATEMENTS OF INCOME
(in millions, except per share amounts)

	<u>Adjustments</u>			As Adjusted 53 Weeks Ended January 2, 2009 **	As Reported		As Adjusted 52 Weeks Ended December 28, 2007 **	Percent Better/ (Worse) Adjusted 2008 vs. Adjusted 2007
	As Reported 53 Weeks Ended January 2, 2009	Restructuring Costs & Other Charges	Certain Tax Items		52 Weeks Ended December 28, 2007	ESOP Adjustment		
REVENUES								
Base management fees	\$ 635	\$ -	\$ -	\$ 635	\$ 620	\$ -	\$ 620	2
Franchise fees	451	-	-	451	439	-	439	3
Incentive management fees	311	-	-	311	369	-	369	(16)
Owned, leased, corporate housing and other revenue ¹	1,225	-	-	1,225	1,240	-	1,240	(1)
Timeshare sales and services ²	1,423	61	-	1,484	1,747	-	1,747	(15)
Cost reimbursements ³	8,834	-	-	8,834	8,575	-	8,575	3
Total Revenues	12,879	61	-	12,940	12,990	-	12,990	-
OPERATING COSTS AND EXPENSES								
Owned, leased and corporate housing - direct ⁴	1,088	-	-	1,088	1,062	-	1,062	(2)
Timeshare - direct	1,334	3	-	1,337	1,397	-	1,397	4
Reimbursed costs	8,834	-	-	8,834	8,575	-	8,575	(3)
Restructuring costs ⁵	55	(55)	-	-	-	-	-	*
General, administrative and other ⁶	783	(32)	-	751	768	(35)	733	(3)
Total Expenses	12,094	(84)	-	12,010	11,802	(35)	11,767	(2)
OPERATING INCOME	785	145	-	930	1,188	35	1,223	(24)
Gains and other income (includes gains on debt extinguishment of \$28M) ⁷	38	9	-	47	97	-	97	(52)
Interest expense	(163)	-	-	(163)	(184)	13	(171)	5
Interest income	39	-	-	39	38	-	38	3
(Provision for) reversal of loan losses	(20)	22	-	2	(17)	-	(17)	112
Equity in earnings (losses) ⁸	15	16	-	31	15	-	15	107
INCOME FROM CONTINUING OPERATIONS								
BEFORE INCOME TAXES AND MINORITY INTEREST	694	192	-	886	1,137	48	1,185	(25)
Provision for income taxes	(350)	(68)	72	(346)	(441)	6	(435)	20
Minority interest, net of tax	15	-	-	15	1	-	1	1,400
INCOME FROM CONTINUING OPERATIONS	359	124	72	555	697	54	751	(26)
Discontinued operations - Synthetic Fuel, net of tax ⁹	3	-	-	3	(1)	-	(1)	400
NET INCOME	\$ 362	\$ 124	\$ 72	\$ 558	\$ 696	\$ 54	\$ 750	(26)
EARNINGS PER SHARE - Basic								
Earnings from continuing operations ¹⁰	\$ 1.02	\$ 0.35	\$ 0.20	\$ 1.58	\$ 1.85	\$ 0.14	\$ 1.99	(21)
Earnings from discontinued operations ⁹	0.01	-	-	0.01	-	-	-	*
Earnings per share ¹⁰	\$ 1.03	\$ 0.35	\$ 0.20	\$ 1.59	\$ 1.85	\$ 0.14	\$ 1.99	(20)
EARNINGS PER SHARE - Diluted								
Earnings from continuing operations ¹⁰	\$ 0.98	\$ 0.34	\$ 0.20	\$ 1.51	\$ 1.75	\$ 0.14	\$ 1.89	(20)
Earnings from discontinued operations ⁹	0.01	-	-	0.01	-	-	-	*
Earnings per share ¹⁰	\$ 0.99	\$ 0.34	\$ 0.20	\$ 1.52	\$ 1.75	\$ 0.14	\$ 1.89	(20)
Basic Shares	351.8	351.8	351.8	351.8	376.1	376.1	376.1	
Diluted Shares	366.9	366.9	366.9	366.9	397.3	397.3	397.3	

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⁵ - *Restructuring costs* include the write-off of capitalized development costs related to certain projects that we discontinued, severance charges as a result of Timeshare and above-property personnel reductions, and facilities exit costs arising from the reduction in personnel.

⁶ - *General, administrative and other* expenses include the overhead costs allocated to our segments, and our corporate overhead costs and general expenses.

⁷ - *Gains and other income* includes gains and losses on the sale of real estate, gains on note sales or repayments (except timeshare note securitization gains), sale of joint ventures, gains on debt extinguishment and income from cost method joint ventures.

⁸ - *Equity in earnings (losses)* includes our equity in earnings (losses) of unconsolidated equity method joint ventures.

⁹ - *Discontinued operations* relates to our Synthetic Fuel business which was shut down and substantially all the assets liquidated at December 28, 2007.

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MARRIOTT INTERNATIONAL, INC.
EBITDA AND ADJUSTED EBITDA
(\$ in millions)

	Fiscal Year 2008				
	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	Total
Net income	\$ 121	\$ 157	\$ 94	\$ (10)	\$ 362
Interest expense	42	38	33	50	163
Tax provision, continuing operations	75	139	103	33	350
Tax provision, minority interest	1	1	5	2	9
Tax benefit, synthetic fuel	-	(6)	(1)	-	(7)
Depreciation and amortization	41	47	42	60	190
Less: Depreciation reimbursed by third-party owners	(3)	(3)	(2)	(2)	(10)
Interest expense from unconsolidated joint ventures	4	4	5	5	18
Depreciation and amortization from unconsolidated joint ventures	5	6	6	10	27
EBITDA **	\$ 286	\$ 383	\$ 285	\$ 148	\$ 1,102
Discontinued operations adjustment (synthetic fuel)	1	2	1	-	4
Non-recurring charges					
Severance	-	-	-	19	19
Facilities exit costs	-	-	-	5	5
Development cancellations	-	-	-	31	31
Total restructuring costs	-	-	-	55	55
Charges related to guarantees	-	-	-	16	16
Inventory write-downs	-	-	-	9	9
Contract cancellation allowances	-	-	-	12	12
Accounts receivable-bad debts	-	-	-	4	4
Residual interests valuation	-	-	-	32	32
Hedge ineffectiveness	-	-	-	12	12
Impairment of investments and other (operating)	-	-	-	12	12
Impairment of investments and other (non operating)	-	-	-	18	18
Reserves for loan losses	-	-	-	22	22
Total other charges	-	-	-	137	137
Total non-recurring charges	-	-	-	192	192
Adjusted EBITDA **	\$ 287	\$ 385	\$ 286	\$ 340	\$ 1,298
Decrease over 2007 Adjusted EBITDA	-14%	-13%	-7%	-32%	-18%
The following items make up the discontinued operation: adjustment (synthetic fuel)					
Pre-tax Synthetic Fuel losses	\$ 1	\$ 2	\$ 1	\$ -	\$ 4
EBITDA adjustment for discontinued operations (synthetic fuel)	\$ 1	\$ 2	\$ 1	\$ -	\$ 4

	Fiscal Year 2007				
	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	Total
Net income	\$ 182	\$ 207	\$ 131	\$ 176	\$ 696
Interest expense	33	52	42	57	184
Tax provision, continuing operations	86	128	93	134	441
Tax (benefit) provision, synthetic fuel	(72)	(86)	(41)	73	(126)
Depreciation and amortization	46	45	43	63	197
Less: Depreciation reimbursed by third-party owners	(4)	(4)	(4)	(6)	(18)
Interest expense from unconsolidated joint ventures	5	5	8	6	24
Depreciation and amortization from unconsolidated joint ventures	6	7	6	9	28
EBITDA **	\$ 282	\$ 354	\$ 278	\$ 512	\$ 1,426
ESOP Settlement - Excise Tax	-	35	-	-	35
Discontinued operations adjustment (synthetic fuel)	52	52	30	(15)	119
Adjusted EBITDA **	\$ 334	\$ 441	\$ 308	\$ 497	\$ 1,580
The following items make up the discontinued operations adjustment (synthetic fuel)					
Pre-tax Synthetic Fuel losses (income)	\$ 54	\$ 54	\$ 32	\$ (13)	\$ 127
Synthetic Fuel depreciation	(2)	(2)	(2)	(2)	(8)
EBITDA adjustment for discontinued operations (synthetic fuel)	\$ 52	\$ 52	\$ 30	\$ (15)	\$ 119

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MARRIOTT INTERNATIONAL, INC.
TIMESHARE SEGMENT

(\$ in millions)

	<u>Adjustments</u>			<u>As Reported</u> <u>16 Weeks Ended</u> <u>December 28, 2007</u>	<u>Percent Better /</u> <u>(Worse) Adjusted</u> <u>2008 vs. 2007</u> <u>As Reported</u>
	<u>As Reported</u> <u>17 Weeks Ended</u> <u>January 2, 2009</u>	<u>Restructuring</u> <u>Costs & Other</u> <u>Charges</u>	<u>As Adjusted</u> <u>17 Weeks Ended</u> <u>January 2, 2009 **</u>		
Segment Revenues					
Segment revenues	\$ 424	\$ 61	\$ 485	\$ 627	(23)
Segment Results					
Base fees revenue	\$ 7	\$ -	\$ 7	\$ 13	(46)
Timeshare sales and services, net	(48)	58	10	126	(92)
Restructuring costs	(28)	28	-	-	*
Joint venture equity earnings	2	7	9	6	50
Minority interest	4	-	4	-	*
General, administrative and other expense	(32)	-	(32)	(29)	(10)
Segment results	\$ (95)	\$ 93	\$ (2)	\$ 116	(102)
Sales and Services Revenue					
Development	\$ 231	\$ 17	\$ 248	\$ 362	(31)
Services	92	-	92	90	2
Financing	(1)	44	43	75	(43)
Other revenue	3	-	3	9	(67)
Sales and services revenue	\$ 325	\$ 61	\$ 386	\$ 536	(28)
Contract Sales					
Company:					
Timeshare	\$ 222	\$ -	\$ 222	\$ 344	(35)
Fractional	1	2	3	17	(82)
Residential	(23)	16	(7)	(15)	53
Total company	200	18	218	346	(37)
Joint ventures:					
Timeshare	-	-	-	10	(100)
Fractional	(23)	21	(2)	8	(125)
Residential	(74)	76	2	2	-
Total joint ventures	(97)	97	-	20	(100)
Total contract sales, including joint ventures	\$ 103	\$ 115	\$ 218	\$ 366	(40)
Gain / (Loss) on Notes Sold					
Gain / (loss) on notes sold	\$ (12)	\$ 12	\$ -	\$ 36	(100)

* Percent can not be calculated.

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MARRIOTT INTERNATIONAL, INC.
TIMESHARE SEGMENT

(\$ in millions)

	As Reported 53 Weeks Ended January 2, 2009	Adjustments Restructuring Costs & Other Charges	As Adjusted 53 Weeks Ended January 2, 2009 **	As Reported 52 Weeks Ended December 28, 2007	Percent Better / (Worse) Adjusted 2008 vs. 2007 As Reported
Segment Revenues					
Segment revenues	\$ 1,750	\$ 61	\$ 1,811	\$ 2,065	(12)
Segment Results					
Base fees revenue	\$ 42	\$ -	\$ 42	\$ 43	(2)
Timeshare sales and services, net	89	58	147	350	(58)
Restructuring costs	(28)	28	-	-	*
Joint venture equity earnings	11	7	18	10	80
Minority interest	25	-	25	1	2,400
General, administrative and other expense	(111)	-	(111)	(98)	(13)
Segment results	\$ 28	\$ 93	\$ 121	\$ 306	(60)
Sales and Services Revenue					
Development	\$ 953	\$ 17	\$ 970	\$ 1,208	(20)
Services	336	-	336	315	7
Financing	106	44	150	195	(23)
Other revenue	28	-	28	29	(3)
Sales and services revenue	\$ 1,423	\$ 61	\$ 1,484	\$ 1,747	(15)
Contract Sales					
Company:					
Timeshare	\$ 1,081	\$ -	\$ 1,081	\$ 1,221	(11)
Fractional	35	2	37	44	(16)
Residential	10	16	26	(9)	*
Total company	1,126	18	1,144	1,256	(9)
Joint ventures:					
Timeshare	-	-	-	33	(100)
Fractional	(6)	21	15	54	(72)
Residential	(44)	76	32	58	(45)
Total joint ventures	(50)	97	47	145	(68)
Total contract sales, including joint ventures	\$ 1,076	\$ 115	\$ 1,191	\$ 1,401	(15)
Gain on Notes Sold					
Gain on notes sold	\$ 16	\$ 12	\$ 28	\$ 81	(65)

* Percent can not be calculated.

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