

**IN THE UNITED STATES BANKRUPTCY COURT  
FOR THE DISTRICT OF DELAWARE**

<p>In re</p> <p>WASHINGTON MUTUAL, INC., <i>et al.</i>,<sup>1</sup></p> <p style="text-align:center">Debtors.</p>	<p>Chapter 11</p> <p>Case No. 08-12229 (MFW)</p> <p>Jointly Administered</p> <p>Related Docket Nos. 9181, 9222</p>
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**NOTICE OF FILING OF PROPOSED SUPPLEMENT TO EQUITY COMMITTEE'S  
PROPOSED LETTER IN SUPPORT OF CONFIRMATION OF THE SEVENTH  
AMENDED JOINT PLAN OF AFFILIATED DEBTORS PURSUANT  
TO CHAPTER 11 OF THE UNITED STATES BANKRUPTCY CODE**

**PLEASE TAKE NOTICE** that on December 12, 2011, the above-captioned debtors and debtors in possession (the "Debtors") filed that certain *Motion of Debtors for an Order, Pursuant to Sections 105, 502, 1125, 1126 and 1128 of the Bankruptcy Code and Bankruptcy Rules 2022, 3003, 3017, 3018, 3019, 3020 and 9006 (I) Approving the Proposed Disclosure Statement and the Form and Manner of the Notice of the Proposed Disclosure Statement Hearing, (II) Establishing Solicitation and Voting Procedures, (III) Scheduling a Confirmation Hearing, and (IV) Establishing Notice and Objection Procedures for Confirmation of the Debtors' Seventh Amended Plan* [D.I. 9181] (the "Motion").

**PLEASE TAKE FURTHER NOTICE** that on December 20, 2011, the Debtors filed that certain *Notice of Addendum* to the Motion [D.I. 9222] (the "Addendum"). Attached as exhibits to the Addendum were proposed letters prepared by each of the Debtors, the official committee of unsecured creditors and the official committee of equity security holders (the "Equity Committee") in support of confirmation of the Seventh Amended Joint Plan of Affiliated Debtors Pursuant to Chapter 11 of the United States Bankruptcy Code dated December 12, 2011 [D.I. 9178] (the "Seventh Amended Plan"). The letter prepared by the Equity Committee (the "Equity Committee Plan Support Letter") was attached to the Addendum as Exhibit A-3.

**PLEASE TAKE FURTHER NOTICE** that the Equity Committee has prepared responses to certain of the most frequently asked questions received by the Equity Committee regarding the Seventh Amended Plan (the "Supplement"), which is intended to supplement the Equity Committee Plan Support Letter attached to the Addendum as Exhibit A-3. The Supplement is attached hereto as Exhibit A.

**PLEASE TAKE FURTHER NOTICE** that a hearing to consider the relief requested in the Motion is scheduled for January 11, 2012 at 2:00 p.m. before the United States Bankruptcy

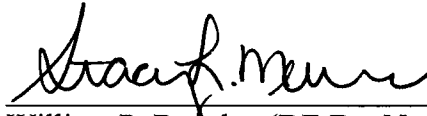
<sup>1</sup> Debtors in these Chapter 11 cases and the last four digits of each Debtor's federal tax identification numbers are: (i) Washington Mutual, Inc. (3725) and (ii) WMI Investment Corp. (5395). The Debtors are located at 925 Fourth Avenue, Suite 2500, Seattle, Washington 98104.



Court for the District of Delaware (the “Bankruptcy Court”). At that time, the Equity Committee will request that the Bankruptcy Court authorize the Debtors to include the Supplement, along with the Equity Committee Plan Support Letter, in the solicitation packages and materials to be distributed to WMI shareholders.

Dated: January 6, 2012  
Wilmington, Delaware

**ASHBY & GEDDES, P.A.**



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**EXHIBIT A**

**The Equity Committee has received a substantial number of questions about the Seventh Amended Plan from shareholders. Below are the Equity Committee's responses to many of the most frequently asked questions.**

**Shareholders should review the Disclosure Statement, Seventh Amended Plan, and each of the documents referred to herein carefully. This document is not a substitute for that review and is qualified by the terms of the documents referred to herein. In case of any inconsistencies between this document and the Disclosure Statement or the Seventh Amended Plan, the Disclosure Statement and the Seventh Amended Plan will control.**

**Q: Do any of the members of the Equity Committee hold preferred stock?**

A: Yes. Two of the three members hold preferred stock. At least one member holds pre-seizure stock.

**Q: How does the Equity Committee make decisions?**

A: Each committee member has one vote on all matters. A majority of votes is required for any action to be taken by the Equity Committee.

**Q: Why does the Equity Committee believe the proposed Seventh Amended Plan and the settlement is in the best interest of WMI shareholders?**

A: The Equity Committee firmly believes that the Seventh Amended Plan represents the best opportunity for recovery by WMI shareholders. Under this plan, Reorganized WMI will have a multi-billion dollar net operating loss carryforward ("NOL"), \$75 million in funding, and access to a \$125 million financing facility to start or acquire a business. Under the Seventh Amended Plan, Reorganized WMI has the potential and the wherewithal to become a viable financial institution owned by WMI's existing equity holders. Alternative paths for recovery for equity would have required continued litigation, quite possibly for years, at huge cost and with no guarantees of success and much risk.

In deciding to enter into the settlement that became the basis for the modified Seventh Amended Plan, the Equity Committee was advised by its professionals, including its attorneys. The Equity Committee cannot publicly disclose the specific advice it received or the work product of its counsel without running the risk that the attorney-client and work product privileges would be lost and that this information would then become discoverable by third parties against whom the Equity Committee would be pursuing claims if the proposed Seventh Amended Plan is ultimately not confirmed by the Bankruptcy Court.

Among the factors that the Equity Committee considered in deciding to settle were the following:

Recovery from JPMC or the FDIC would require undoing the Global Settlement Agreement, which the Bankruptcy Court has now twice approved. Although the Equity Committee has a pending appeal of that decision, it is very possible that the Equity Committee's appeal will be

rendered moot if a plan is confirmed and the terms of the Global Settlement are implemented. The Equity Committee has sought leave for immediate appeal from the Delaware District Court, but to date, leave has not been granted. Even if the appeal were heard, the Bankruptcy Court's decision approving the Global Settlement is entitled to substantial deference under the controlling standard of review by the appeals courts.

Recovery of additional value from the Settlement Note Holders also faces significant challenges. Although the Bankruptcy Court found that the Equity Committee's allegations of misconduct against the hedge funds present a "colorable claim" for equitable disallowance, that was not a final decision by the Bankruptcy Court on the merits of the claims. It was a significant decision, but it was one that only would have allowed the Equity Committee to proceed with litigation in the absence of a settlement; it was not a finding of wrongdoing. The Settlement Note Holders have made abundantly clear that they intend to fight these allegations vigorously and are prepared to spend significant time and money in doing so. They have described many of their legal and factual defenses to the claims for equitable disallowance in their pending motions for leave to appeal the Bankruptcy Court's order. Although the Equity Committee disagrees with these arguments, they are not frivolous, and there is no assurance that at the end of potentially years of additional litigation and appeals the Equity Committee will prevail.

The Equity Committee and its professionals have fought many battles for shareholders in this bankruptcy. We successfully opposed confirmation of two plans that would have provided no recovery to equity. We walked away from a prior settlement proposal when it became clear that the terms of the deal would be so onerous for Reorganized WMI that equity holders were very unlikely to see any recovery. We are convinced that this deal is different, and that it constitutes equity's best chance at a meaningful recovery.

**Q: Is this proposed settlement any better than the deal that was under consideration in June 2011?**

A: Yes, the Equity Committee believes that the current settlement is significantly better in several respects. It provides a number of advantages with respect to Reorganized WMI. First, the runoff notes will be non-recourse, limiting creditors' recovery from the company to the value of the reinsurance portfolio. This was not the case in the prior negotiations. Second, it provides for \$75 million in cash funding to Reorganized WMI. (Contrary to representations in some questions we have received from shareholders, none of this \$75 million is committed to attorneys fees.) Third, it provides for a larger credit facility—\$125 million—on more favorable terms. Fourth, it provides for a contribution of \$10 million in proceeds from WMMRC's insurance portfolio and certain litigation proceeds to Reorganized WMI. The Equity Committee believes that these financial concessions (the non-recourse runoff notes, cash, credit facility, and insurance and litigation proceeds) give Reorganized WMI a meaningful opportunity to get off the ground as a new business and potentially to provide significant additional recovery to current WMI shareholders. The current settlement also provides for greater representation of equity on the board of the Liquidating Trust, and, in particular, for equity representatives to control future litigation claims that presents the best chance of a recovery for equity holders from the Liquidating Trust.

**Q: Have any of the Equity Committee’s attorneys or other professionals been retained, or been given promises of retention, by the Liquidating Trust?**

A: No. If the Seventh Amended Plan is confirmed, the Trust Advisory Board and Litigation Subcommittee will have authority to retain counsel to pursue and defend litigation claims. In several instances, as described in the Disclosure Statement, firms that have already been working on certain claims will be retained (at least initially) to continue that work. These include Klee Tuchin, for claims against former Officers and Directors of WMI and its affiliates, and Weil Gotshal and Quinn Emanuel for the defense of the company against certain securities-related claims. Susman Godfrey, Ashby & Geddes and Schwabe, Williamson & Wyatt have not been offered the responsibility for any litigation or any other representation of the Liquidating Trust and there is no express or implicit arrangement for the retention of either of these firms in the future.

**Q: What will my reorganized shares be worth?**

A: The value of your reorganized shares will primarily be determined by the future success of Reorganized WMI. The Equity Committee believes the success of the new company will depend, among other things, on the business judgment, ingenuity, planning, and execution of business strategies by a new Board of Directors and new management. In addition, recoveries for equity holders will be enhanced by any proceeds received by the Liquidating Trust in excess of remaining creditor claims.

**Q: Can the judge change the distribution to shareholders?**

A: Under the Seventh Amended Plan, current holders of WMI’s preferred equity who agree to grant the Non-Debtor Releases (described in Section 41.6 of the Seventh Amended Plan) are entitled to receive their pro rata share of up to 70% of the common stock in Reorganized WMI, and the current holders of WMI’s common equity who agree to grant the Non-Debtor Releases are entitled to receive their pro rata share of up to 30% of the common stock in Reorganized WMI. The Seventh Amended Plan provides that if the Bankruptcy Court determines that the foregoing allocation of the Reorganized Common Stock is not appropriate, the Bankruptcy Court may alter the allocation. The Equity Committee believes that the proposed allocation is fair and supportable. However, it is possible that the Bankruptcy Court may determine that the Bankruptcy Code, or the case law interpreting the Bankruptcy Code, requires that current holders of common equity receive no recovery unless the holders of preferred equity consent.

**Q: Are plans in place for Reorganized WMI to be acquired or merge with another entity shortly after emergence?**

A: To our knowledge, no such plans have been made, could not be made, and no discussions have occurred with any third-parties. Any merger or acquisition of Reorganized WMI would be the responsibility of the new Board of Directors. No one should assume that Reorganized WMI will be an attractive target for acquisition or merger with third parties.

**Q: Why are the notes for the value of the runoff of the insurance portfolio paying 13% interest?**

A: Thirteen percent is the discount rate that was applied to anticipated future revenues from the reinsurance portfolio to arrive at the \$140 million present value of that portfolio. A corresponding interest rate must therefore be applied to the \$140 million notes in order to capture the value of the runoff assets. It is important to remember that the notes are non-recourse and creditors who hold those notes will not be able to collect any amounts due (whether principal or interest) from any assets held by Reorganized WMI other than the runoff portfolio.

**Q: Who will be on the Board of Directors of Reorganized WMI?**

A: Upon emergence from bankruptcy, the Board of Reorganized WMI will consist of five directors. The Equity Committee will select four members of this initial board. One member has been selected by the underwriters of the new company's credit facility. The Equity Committee is currently assessing various candidates for the four positions that the Equity Committee would be empowered to appoint. The Equity Committee intends to identify its selections for the board and make them publicly known before current shareholders must submit their ballots on the Seventh Amended Plan.

**Q: Will shareholders of Reorganized WMI be allowed to change the new Board of Directors?**

A: Shareholders of Reorganized WMI will have the ability to elect board members under the normal corporate governance process and will have removal rights as provided under Washington law.

**Q: How will the Board of Directors of Reorganized WMI be compensated?**

A: Just as with any corporation, the new Board of Directors will determine its compensation. The Board will make this determination in accordance with its business judgment based on market and other factors. It is the expectation of the Equity Committee that the new Board of Directors and new management will receive compensation that is aligned with shareholders' interests in order to enhance the new company's value.

**Q: Can I elect to receive shares in Reorganized WMI after it emerges from bankruptcy?**

A: No. In order to receive shares in Reorganized WMI under the proposed Seventh Amended Plan, a shareholder must grant releases by the voting deadline. Allowing the issuance of shares after the emergence of Reorganized WMI from bankruptcy could be interpreted by the IRS as a change of control, which would jeopardize the company's ability to use its significant Net Operating Loss (NOL) carry-forwards under IRS regulations.



**Q: Why do the various creditor classes have up to one year to grant releases but shareholders have only until February 22, 2012 to grant releases?**

A: As explained in the answer to the previous question, our understanding is that to preserve the company's ability to use NOL carry-forwards, IRS regulations require that ownership of Reorganized WMI be fixed at the time of emergence from bankruptcy (with only limited subsequent changes). These regulatory change-of-control provisions do not apply to the creditors because they will not become owners of Reorganized WMI.

**Q: What does the term "restricted stock" mean?**

A: Restricted stock is stock that is subject to certain restrictions on its transferability. These restrictions are typically imposed by Federal and state securities laws, but may also be imposed by a company's articles of incorporation, bylaws, or shareholder agreements. Under the proposed Seventh Amended Plan, the transferability of the stock of Reorganized WMI would be restricted by the company's proposed articles of incorporation.

**Q: Why will the transfer of stock of the reorganized debtor be restricted?**

A: Under Section 1145(a) of the Bankruptcy Code, except with respect to an underwriter, stock issued pursuant to a plan of reorganization in exchange for a claim against debtor is exempt from the registration requirements under the securities law and typically not restricted, except in the hands of control persons. However, in our case, restrictions on subsequent transfer is advisable to reduce the risk of the IRS taking the position that a change of control had occurred and therefore attempting to disallow Reorganized WMI's future use of the very significant NOL carry-forwards. Specifically, it was deemed necessary to restrict the ability of a shareholder to beneficially own more than 4.75% of Reorganized WMI common stock, and if a shareholder initially owns more than 4.75% of Reorganized WMI common stock upon emergence, to restrict the shareholder's ability to dispose of such stock. The proposed restrictions will be described in the proposed form of articles of incorporation of Reorganized WMI.

**Q: Will the stock of Reorganized WMI be tradable immediately upon emergence?**

A: This will depend on a number of factors, including requirements imposed by the SEC upon emergence from bankruptcy. The new Board of Directors will evaluate the options available with regard to trading markets and determine what is in the best interests of the reorganized company. The stock will not immediately be listed on a nationally recognized stock exchange and may not ever be so listed. Reorganized WMI may be able to have its stock quoted on the OTCBB and/or the "OTC-Pink", subject to meeting certain eligibility requirements. Subject to the restrictions on transfer contained in the articles of incorporation discussed above and complying with applicable securities laws, the stock should be transferable if quoted on the OTCBB on OTC-Pink.

**Q: Who are the Equity Committee's three appointees to the Liquidating Trust Advisory Board?**

A: Michael Willingham, chair of the Equity Committee; Joel Klein, an employee of PPM America, an investor in WMB bonds that had asserted a claim against the WMI Estate; and Hon. Douglas Southard, a pre-bankruptcy shareholder and a very recently retired Superior Court Judge for Santa Clara County California (1998 through 2011).

**Q: Why did the Equity Committee vote to appoint a representative from one of the WMB bondholder groups as a member of the Liquidating Trust?**

A: A group of WMB bondholders, including PPM America, asserted a multi-hundred million dollar claim against the estate, the holders of which could be expected to argue that their claim, if allowed, would need to be satisfied before WMI equity holders could receive anything. Shortly before the Modified Seventh Amended Plan was filed, the Debtors (in consultation with the Equity Committee) negotiated a settlement with this group of WMB bondholders for an allowed claim in the amount of \$15 million. As part of the quid pro quo for the agreement by these WMB bondholders to reduce their claim, the Equity Committee agreed to the appointment of these bondholders' nominee to the Liquidating Trust Advisory Board.

**Q: How did Mr. Willingham get appointed as a candidate to serve on the Liquidating Trust Advisory Board?**

A: The Equity Committee voted to have Mr. Willingham serve in this capacity. Having served on the Equity Committee since its inception, Mr. Willingham has extensive knowledge of the WMI bankruptcy proceedings and of related claims. The Equity Committee determined that it was in the best interests of the Liquidating Trust to utilize Mr. Willingham's knowledge and experience. Mr. Willingham abstained from voting on his appointment.

**Q: How will the members of the Liquidating Trust Advisory Board be compensated?**

A: Terms of compensation for the TAB are still under negotiation but will be announced before equity holders will be asked to vote on the Plan. Compensation is expected to be at a market rate comparable to the compensation paid to liquidating trust board members in other major bankruptcies.

**Q: Why did the Equity Committee agree to accept Mr. Kosturos as the initial Liquidating Trustee?**

A: The Equity Committee believes that Mr. Kosturos' knowledge about the claims and causes of action that will be under the control of the Liquidating Trust after emergence from bankruptcy, as well as other issues that will need to be addressed and resolved by the Liquidating Trust will be useful, at least during a transition period. Mr. Kosturos will serve as the Liquidating Trustee only for an initial transition period, probably of six months. Any concerns about Mr. Kosturos' willingness to protect the interests of equity holders should be ameliorated by the limited term for which he will serve and by the supervision of the Liquidating Trust Advisory Board.

**Q: What litigation claims will the Liquidating Trust pursue and for whose benefit?**

A: The Litigation Subcommittee of the Liquidating Trust Advisory Board will have authority to pursue all affirmative claims belonging to WMI that have not been resolved or settled. These include certain claims for pre-petition misconduct that contributed to the bankruptcy. Depending on the results of an investigation into the merits of these claims, the targets of such claims might include WMI's audit firm Deloitte & Touche, former officers and directors of the company, and underwriters and other firms retained by WMI such as Goldman Sachs. Any proceeds recovered from this litigation will flow through the waterfall to creditors whose claims have not been paid in full by the initial distribution. If and when those creditors have been made whole, further proceeds would benefit equity.

**Q: Will WMB Bondholders have any right to recover proceeds from the Liquidating Trust?**

A: As a general matter, no, WMB Bondholders do not have a right to proceeds of the Liquidating Trust. The exception is for WMB Bondholders who have asserted a claim against the WMI Estate that has been resolved, as part of the settlement referred to earlier, by creation of an allowed claim in Class 18. These WMB Bondholders are entitled to recover the \$15 million amount of their allowed claim, plus post-petition interest, from any assets distributed by the Liquidating Trust as provided by the priority scheme in the Bankruptcy Code (i.e., the "waterfall").

**Q: Why did the Equity Committee agree to a settlement without the involvement of the TPS Group or the Dime Warrant Holders?**

A: The TPS Group was initially invited to the mediation but was excused early in the process by the mediator. The remaining parties followed Judge Lyons' guidance in reaching a settlement without the TPS Group. The Dime Warrant Holders were not invited to the initial mediation session, but were included in a subsequent mediation to which the Equity Committee was also invited. However, that subsequent session did not result in a settlement. The Equity Committee believes that the current settlement agreement represents the most reasonable chance for a recovery by equity holders despite the fact that the TPS Group and the Dime Warrant Holders did not participate in its negotiation.


**Q: Why did the Equity Committee agree to mediate without the involvement of JPMC and the FDIC?**

A: Judge Walrath directed that JPMC and the FDIC be excluded from the mediation, which is consistent with her repeated rulings that the Global Settlement Agreement is fair and reasonable. Given that ruling, the Equity Committee believes that JPMC and the FDIC have little or no incentive to re-open the negotiation of the Global Settlement and consider making substantial additional contributions to the WMI estate. In the overall context of the case, including the Bankruptcy Court's rulings to date, the Equity Committee believes that the current settlement gives equity the best possible chance for a recovery and is preferable to the uncertainty and risk

of continued efforts to litigate against JPMC or the FDIC as well as against the Settlement Note Holders and other parties who did participate in this mediation.

**CERTIFICATE OF SERVICE**

I, Stacy L. Newman, hereby certify that on January 6, 2012, I caused one copy of the foregoing document to be served upon the parties on the attached service list by first class U.S. Mail, postage prepaid.

  
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