



NEWS RELEASE

Information to shareholders regarding Capital Increase (Convertible Notes)

2022-09-06

Notice for Convertible Notes Series G

Notice for Convertible Notes Series H

Notice for Convertible Notes Series I

1) Solicitud Inscripción en Registro de Valores

(1.a) Contrato Emisión de Bonos Convertibles (Parte 1)

(1.b) Contrato Emisión de Bonos Convertibles (Parte 2)

(1.c) CoNew Convertible Notes Series I,G,H ntrato Emisión de Bonos Convertibles (Parte 3)

(1.d) Contrato Emisión de Bonos Convertibles (Parte 4)

(1.e) Contrato Emisión de Bonos Convertibles (Parte 5)

(1.f) Contrato Emisión de Bonos Convertibles (Parte 6)

(2) Acuerdos Ejecucion Inmediata Directorio LATAM con Certificada Gerente General

(3) Poderes Banco Santander-Chile (representante Tenedores de Bonos)

(4.a) Reducción Acta JEA LATAM (Parte 1)

(4.b) Reducción Acta JEA LATAM (Parte 2)

(4.c) Reducción Acta JEA LATAM (Parte 3)

(5.a) Contrato Registro de Emisiones Desmaterializadas

(5.b) Adendum

(6) Declaración de Responsabilidad Bonos Convertibles

Carta Conectora CMF Bonos Convertibles

ComprobanteCMF_sinpapel

2) Complemento Legalización Extracto

Carta a CMF Complementa Solicitud de Inscripción de Bonos Convertibles (Julio 2022) Reorgan
Comprobante CMF Sin Papel Complemento Solicitud Inscripción Bonos Convertibles
Copia Inscripción Extracto Reformas Latam Airlines Group S.A. (Julio 2022)
Copia Publicación Extracto Reformas Latam Airlines Group S.A. (Julio 2022)
Extracto Reformas Latam Airlines Group S.A. (Julio 2022)

3) Complemento Clasificaciones Riesgo

Carta_a_CMF_Complementa_Solicitud_de_Inscripción_de_Bonos_Convertibles_(Julio_2022)_Adjunta
Certificado Clasificación Riesgo Bonos Series G, H e I (Feller)
Certificado Clasificación Riesgo Bonos Series G, H e I (ICR)
ComprobanteCMF_sinpapel
Declaración_de_Responsabilidad_Bonos_Convertibles_(complementación)_2_agosto_2022. docx

4) Oficio 61874

5) Respuesta Oficio 61874

Carta LATAM a CMF Responde Oficio Ordinario 61.874 (Bonos Convertibles)
ComprobanteCMF_sinpapel
Declaración Responsabilidad Respuesta Oficio CMF Bonos Convertibles
Latam Airlines Group S.A. et al. Confirmed Plan of Reorganization
Primera Modificación Contrato de Emisión de Bonos Convertibles Serie G, H e I

6) Complemento

Carta a CMF Complementa Respuesta Oficio CMF Inscripción Bonos Convertibles (acompaña Certif
Certificado Clasificación Riesgo Bonos Series G, H e I (Feller)
Certificado Clasificación Riesgo Bonos Series G, H e I (ICR)
ComprobanteCMF_sinpapel
Declaración de Responsabilidad Bonos Convertibles Respuesta a Oficio CMF (Complementación 18

7) Certificado CMF N° 519 Inscripción Bonos Convertibles LATAM Airlines Group S.A. (Reorganización) en Registro de Valores

[New Convertible Notes Series I,G,H \(Scroll down to access the subscription agreements if you meet the below criteria \)](#)

The subscription agreements are only available to persons that can certify that they are either (a) a Qualified Institutional Buyer under Rule 144A of the Securities Act of 1933, as amended (the "Securities Act"), (b) an Accredited Investor as such term is defined in Rule 501 of Regulation D of the Securities Act, or (c) a person who is not a U.S. Person as defined in Rule 902(k) under the Securities Act.

Definition of United States

"United States" means the United States of America, its territories and possessions, any State of the United States, and the District of Columbia.

Definition of U.S. Person

"U.S. Person" means:

Any natural person resident in the United States;

Any partnership or corporation organized or incorporated under the laws of the United States;

Any estate of which any executor or administrator is a U.S. person;

Any trust of which any trustee is a U.S. person;

Any agency or branch of a foreign entity located in the United States;

Any non-discretionary account or similar account (other than an estate or trust) held by a dealer or other fiduciary for the benefit or account of a U.S. person;

Any discretionary account or similar account (other than an estate or trust) held by a dealer or other fiduciary organized, incorporated, or (if an individual) resident in the United States; and

Any partnership or corporation if:

Organized or incorporated under the laws of any foreign jurisdiction; and

Formed by a U.S. person principally for the purpose of investing in securities not registered under the Securities Act, unless it is organized or incorporated, and owned, by accredited investors (as defined in Rule 501(a)) who are not natural persons, estates or trusts.

The following are not "U.S. Persons":

Any discretionary account or similar account (other than an estate or trust) held for the benefit or account of a non-U.S. person by a dealer or other professional fiduciary organized, incorporated, or (if an individual) resident in the United States;

Any estate of which any professional fiduciary acting as executor or administrator is a U.S. person if:

An executor or administrator of the estate who is not a U.S. person has sole or shared investment discretion with respect to the assets of the estate; and

The estate is governed by foreign law;

Any trust of which any professional fiduciary acting as trustee is a U.S. person, if a trustee who is not a U.S. person has sole or shared investment discretion with respect to the trust assets, and no beneficiary of the trust (and no settlor if the trust is revocable) is a U.S. person;

An employee benefit plan established and administered in accordance with the law of a country other than the United States and customary practices and documentation of such country;

Any agency or branch of a U.S. person located outside the United States if:

The agency or branch operates for valid business reasons; and

The agency or branch is engaged in the business of insurance or banking and is subject to substantive insurance or banking regulation, respectively, in the jurisdiction where located; and

The International Monetary Fund, the International Bank for Reconstruction and Development, the Inter-American Development Bank, the Asian Development Bank, the African Development Bank, the United Nations, and their agencies, affiliates and pension plans, and any other similar international organizations, their agencies, affiliates and pension plans.

Definition of Qualified Institutional Buyer

“Qualified Institutional Buyer” means:

Any of the following entities, acting for its own account or the accounts of other qualified institutional buyers, that in the aggregate owns and invests on a discretionary basis at least \$100 million in securities of issuers that are not affiliated with the entity:

Any insurance company as defined in Section 2(13) of the Securities Act of 1933, as amended (the “Act”);

- i. Note: A purchase by an insurance company for one or more of its separate accounts, as defined by section 2(a)(37) of the Investment Company Act of 1940 (the “Investment Company Act”), which are neither registered under section 8 of the Investment Company Act nor required to be so registered, shall be deemed to be a purchase for the account of such insurance company.

Any investment company registered under the Investment Company Act of 1940 (the “Investment Company Act”) or any business development company as defined in Section 2(a)(48) of that Act;

Any small business investment company licensed by the U.S. Small Business Administration under Section 301(c) or (d) of the Small Business Investment Act of 1958;

Any plan established and maintained by a state, its political subdivisions, or any agency or instrumentality of a state or its political subdivisions, for the benefit of its employees;

Any employee benefit plan within the meaning of Title I of the Employee Retirement Income Security Act of 1974;

Any trust fund whose trustee is a bank or trust company and whose participants are exclusively plans of the types identified in subparagraph (1)(d) or (e) above, except trust funds that include as participants individual retirement accounts or H.R. 10 plans;

Any business development company as defined in Section 202(a)(222) of the Investment Advisers Act of 1940;
Any organization described in Section 501(c)(3) of the Internal Revenue Code, corporation (other than a bank as defined in Section 3(a)(2) of the Act or a savings and loan association or other institution referenced in Section 3(a)(5)(A) of the Act or a foreign bank or savings and loan association or equivalent institution), partnership, or Massachusetts or similar business trust; and

Any investment adviser registered under the Investment Advisers Act.

Any dealer registered pursuant to Section 15 of the Securities Exchange Act of 1934, as amended (the "Exchange Act"), acting for its own account or the accounts of other qualified institutional buyers, that in the aggregate owns and invests on a discretionary basis at least \$10 million of securities of issuers that are not affiliated with the dealer, provided that securities constituting the whole or a part of an unsold allotment to or subscription by a dealer as a participant in a public offering shall not be deemed to be owned by such dealer;

Any dealer registered pursuant to Section 15 of the Exchange Act acting in a riskless principal transaction (as defined below) on behalf of a qualified institutional buyer;

Note: A registered dealer may act as agent, on a non-discretionary basis, in a transaction with a qualified institutional buyer without itself having to be a qualified institutional buyer.

Any investment company registered under the Investment Company Act, acting for its own account or for the accounts of other qualified institutional buyers, that is part of a family of investment companies which own in aggregate at least \$100 million in securities of issuers, other than issuers that are affiliated with the investment company or are part of such family of investment companies. "Family of investment companies" means any two or more investment companies registered under the Investment Company Act, except for a unit investment trust whose assets consist solely of shares of one or more registered investment companies, that have the same investment adviser (or, in the case of unit investment trusts, the same depositor), provided that:

Each series of a series company (as defined in Rule 18f-2 under the Investment Company Act) shall be deemed to be a separate investment company; and

Investment companies shall be deemed to have the same adviser (or depositor) if their advisers (or depositors) are majority-owned subsidiaries of the same parent, or if one investment company's adviser (or depositor) is a majority-owned subsidiary of the other investment company's adviser (or depositor);

Any entity, all of the equity owners of which are qualified institutional buyers, acting for its own account or the accounts of other qualified institutional buyers; and

Any bank as defined in Section 3(a)(2) of the Act, any savings and loan association or other institution as referenced in Section 3(a)(5)(A) of the Act, or any foreign bank or savings and loan association or equivalent institution, acting for its own account or the accounts of other qualified institutional buyers, that in the aggregate owns and invests on a discretionary basis at least \$100 million in securities of issuers that are not affiliated with it and that has an audited net worth at least \$25 million as demonstrated in its latest annual financial statements, as of a date not more than 16 months preceding the date of sale under the rule in the case of a U.S. bank or savings and loan association, and not more than 18 months preceding such date of sale for a foreign bank or savings and loan

association or equivalent institution.

In determining the aggregate amount of securities owned and invested on a discretionary basis by an entity, the following instruments and interests shall be excluded: bank deposit notes and certificates of deposit; loan participations; repurchase agreements; securities owned but subject to a repurchase agreement; and currency, interest rate and commodity swaps.

The aggregate value of securities owned and invested on a discretionary basis by an entity shall be the cost of such securities, except where the entity reports its securities holdings in its financial statements on the basis of their market value, and no current information with respect to the cost of those securities has been published. In the latter event, the securities may be valued at market for purposes of this section.

In determining the aggregate amount of securities owned by an entity and invested on a discretionary basis, securities owned by subsidiaries of the entity that are consolidated with the entity in its financial statements prepared in accordance with generally accepted accounting principles may be included if the investments of such subsidiaries are managed under the direction of the entity, except that, unless the entity is a reporting company under Section 13 or 15(d) of the Exchange Act, securities owned by such subsidiaries may not be included if the entity itself is a majority-owned subsidiary that would be included in the consolidated financial statements of another enterprise.

For the purposes of paragraph 3, “riskless principal transaction” means a transaction in which a dealer buys a security from any person and makes a simultaneous offsetting sale of such security to a qualified institutional buyer, including another dealer acting as riskless principal for a qualified institutional buyer.

Definition of Accredited Investor

“Accredited Investor” means:

Any person who comes within any of the following categories, or who the issuer reasonably believes comes within any of the following categories, at the time of the sale of the securities to that person:

Any bank as defined in section 3(a)(2) of the Act, or any savings and loan association or other institution as defined in section 3(a)(5)(A) of the Act whether acting in its individual or fiduciary capacity; any broker or dealer registered pursuant to section 15 of the Securities Exchange Act of 1934; any insurance company as defined in section 2(a)(13) of the Act; any investment company registered under the Investment Company Act of 1940 or a business development company as defined in section 2(a)(48) of that Act; any Small Business Investment Company licensed by the U.S. Small Business Administration under section 301(c) or (d) of the Small Business Investment Act of 1958; any plan established and maintained by a state, its political subdivisions, or any agency or instrumentality of a state or its political subdivisions, for the benefit of its employees, if such plan has total assets in excess of \$5,000,000; any

employee benefit plan within the meaning of the Employee Retirement Income Security Act of 1974 if the investment decision is made by a plan fiduciary, as defined in section 3(21) of such act, which is either a bank, savings and loan association, insurance company, or registered investment adviser, or if the employee benefit plan has total assets in excess of \$5,000,000 or, if a self-directed plan, with investment decisions made solely by persons that are accredited investors;

Any private business development company as defined in section 202(a)(22) of the Investment Advisers Act of 1940;
Any organization described in section 501(c)(3) of the Internal Revenue Code, corporation, Massachusetts or similar business trust, or partnership, not formed for the specific purpose of acquiring the securities offered, with total assets in excess of \$5,000,000;

Any director, executive officer, or general partner of the issuer of the securities being offered or sold, or any director, executive officer, or general partner of a general partner of that issuer;

Any natural person whose individual net worth, or joint net worth with that person's spouse, exceeds \$1,000,000;

(1) Except as provided in paragraph (1)(e)(2) of this section, for purposes of calculating net worth under this paragraph (1)(e):

(a) The person's primary residence shall not be included as an asset;

(b) Indebtedness that is secured by the person's primary residence, up to the estimated fair market value of the primary residence at the time of the sale of securities, shall not be included as a liability (except that if the amount of such indebtedness outstanding at the time of sale of securities exceeds the amount outstanding 60 days before such time, other than as a result of the acquisition of the primary residence, the amount of such excess shall be included as a liability); and

(c) Indebtedness that is secured by the person's primary residence in excess of the estimated fair market value of the primary residence at the time of the sale of securities shall be included as a liability;

(2) Paragraph (1)(e)(1) of this section will not apply to any calculation of a person's net worth made in connection with a purchase of securities in accordance with a right to purchase such securities, provided that:

(a) Such right was held by the person on July 20, 2010;

(b) The person qualified as an accredited investor on the basis of net worth at the time the person acquired such right; and

(c) The person held securities of the same issuer, other than such right, on July 20, 2010.

Any natural person who had an individual income in excess of \$200,000 in each of the two most recent years or joint income with that person's spouse in excess of \$300,000 in each of those years and has a reasonable expectation of reaching the same income level in the current year;

Any trust, with total assets in excess of \$5,000,000, not formed for the specific purpose of acquiring the securities offered, whose purchase is directed by a sophisticated person as described in §230.506(b)(2)(ii); and

Any entity in which all of the equity owners are accredited investors.

[Click here to access the subscription agreements if you are a Qualified Institutional Buyer](#)

[Click here to access the subscription agreements if you are a non-US person](#)

Note: If you are a US person who is not a QIB, you are ineligible to access these documents.