

BOEING CO
Form 8-K
October 29, 2015

UNITED STATES
SECURITIES AND EXCHANGE COMMISSION
Washington, D.C. 20549

Form 8-K

Current Report
PURSUANT TO SECTION 13 OR 15(d)
OF THE SECURITIES EXCHANGE ACT OF 1934

October 29, 2015

Date of Report (Date of earliest event reported)

The Boeing Company
(Exact name of registrant as specified in its charter)

Delaware
(State or Other Jurisdiction
of Incorporation)

1-442
(Commission
File No.)

91-0425694
(I.R.S. Employer
Identification Number)

100 N. Riverside, Chicago, IL
(Address of Principal Executive Offices)
(312) 544-2000

60606-1596
(Zip Code)

(Registrant's Telephone Number, Including Area Code)

Check the appropriate box below if the Form 8-K filing is intended to simultaneously satisfy the filing obligation of the registrant under any of the following provisions:

- .. Written communications pursuant to Rule 425 under the Securities Act (17 CFR 230.425)
- .. Soliciting material pursuant to Rule 14a-12 under the Exchange Act (17 CFR 240.14a-12)
- .. Pre-commencement communications pursuant to Rule 14d-2(b) under the Exchange Act (17 CFR 240.14d-2(b))
- .. Pre-commencement communications pursuant to Rule 13e-4(c) under the Exchange Act (17 CFR 240.13e-4(c))

Item 8.01. Other Events.

On October 29, 2015, The Boeing Company (the Company) issued \$900,000,000 in aggregate principal amount of senior notes (the Notes) consisting of (1) \$350,000,000 in aggregate principal amount that bear interest at the rate of 1.65% per annum and will mature on October 30, 2020 (the 2020 Notes), (2) \$250,000,000 in aggregate principal amount that bear interest at the rate of 2.20% per annum and will mature on October 30, 2022 (the 2022 Notes) and (3) \$300,000,000 in aggregate principal amount that bear interest at the rate of 2.60% per annum and will mature on October 30, 2025 (the 2025 Notes). Interest on the Notes is payable semiannually in arrears on April 30 and October 30 of each year, beginning on April 30, 2016. The Notes are unsecured and have the same rank as the Company s other unsecured and unsubordinated debt.

The Notes were issued pursuant to an Indenture dated as of February 1, 2003, between the Company and The Bank of New York Mellon Trust Company, N.A., as successor trustee to JPMorgan Chase Bank. The sale of the Notes was made pursuant to the terms of a Purchase Agreement (the Purchase Agreement), dated October 27, 2015, by and among the Company and (a) with respect to the 2020 Notes, Goldman, Sachs & Co., Merrill Lynch, Pierce Fenner & Smith Incorporated and Morgan Stanley & Co. LLC, (b) with respect to the 2022 Notes, Goldman, Sachs & Co., Citigroup Global Markets Inc. and Deutsche Bank Securities Inc. and (c) with respect to the 2025 Notes, Goldman, Sachs & Co., J.P. Morgan Securities LLC and Mizuho Securities USA Inc., as representatives of the purchasers named therein. The Company may redeem the Notes in whole or in part, upon at least 30 days notice but not more than 60 days notice, at any time prior to maturity at the applicable redemption price described in the Final Prospectus Supplement dated October 27, 2015, as filed with the Securities and Exchange Commission (the SEC) on October 28, 2015 (the Final Prospectus Supplement).

The Notes were registered under the Securities Act of 1933, as amended, pursuant to the Company s Registration Statement on Form S-3 (Registration No. 333-202311), as filed with the SEC on February 26, 2015. The Company has filed with the SEC a Prospectus dated February 26, 2015, a Preliminary Prospectus Supplement dated October 27, 2015, a Free Writing Prospectus dated October 27, 2015, and the Final Prospectus Supplement in connection with the public offering of the Notes.

The above description of the Purchase Agreement is qualified in its entirety by reference to the Purchase Agreement, a copy of which is filed as Exhibit 1.1 hereto and is incorporated herein by reference. Kirkland & Ellis LLP has issued an opinion, dated October 29, 2015, to the Company regarding certain legal matters with respect to the offering of the Notes, a copy of which is filed as Exhibit 5.1 hereto.

Item 9.01 Financial Statements and Exhibits.

(d) Exhibits.

Exhibit

Number

Description

- | | |
|-----|---|
| 1.1 | Purchase Agreement, dated October 27, 2015, among the Company and, with respect to the 2020 Notes, Goldman, Sachs & Co., Merrill Lynch, Pierce Fenner & Smith Incorporated and Morgan Stanley & Co. LLC, with respect to the 2022 Notes, Goldman, Sachs & Co., Citigroup Global Markets Inc. and Deutsche Bank Securities Inc. and with respect to the 2025 Notes, Goldman, Sachs & Co., J.P. Morgan Securities LLC and Mizuho Securities USA Inc., as representatives of the purchasers named therein. |
| 5.1 | Opinion of Kirkland & Ellis LLP. |

SIGNATURE

Pursuant to the requirements of the Securities Exchange Act of 1934, as amended, the registrant has duly caused this report to be signed on its behalf by the undersigned, hereunto duly authorized.

THE BOEING COMPANY

By: /s/ Michael F. Lohr
Michael F. Lohr

Vice President, Assistant General Counsel

and Corporate Secretary

Dated: October 29, 2015

INDEX TO EXHIBITS

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