

GENERAL DYNAMICS CORP
Form 8-K
November 06, 2012

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

Date of Report (Date of earliest event reported): November 6, 2012 (November 6, 2012)

GENERAL DYNAMICS CORPORATION

(Exact name of registrant as specified in its charter)

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Delaware
(State or Other Jurisdiction

1-3671
(Commission

13-1673581
(IRS Employer

of incorporation)

File Number)

Identification No.)

2941 Fairview Park Drive, Suite 100,

Falls Church, Virginia
(Address of principal executive offices)

(703) 876-3000

22042-4513
(Zip code)

(Registrant's telephone number, including area code)

Not Applicable

(Former name or former address, if changed since last report.)

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 November 6, 2012, General Dynamics Corporation (the Corporation) completed the sale of an aggregate of \$2.4 billion principal amount of notes as follows:

\$900,000,000 aggregate principal amount of 1.000% Notes due 2017,

\$1,000,000,000 aggregate principal amount of 2.250% Notes due 2022 and

\$500,000,000 aggregate principal amount of 3.600% Notes due 2042.

The notes were sold pursuant to an underwriting agreement dated November 1, 2012, between the Corporation and certain of its subsidiaries and J.P. Morgan Securities LLC, Merrill Lynch, Pierce, Fenner & Smith Incorporated, RBS Securities Inc. and Wells Fargo Securities, LLC, as representatives of the underwriters named therein.

The notes were issued pursuant to the Seventh Supplemental Indenture, dated as of November 6, 2012, under the Indenture, dated as of August 27, 2001, among the Corporation, the Guarantors (as defined therein) and The Bank of New York Mellon, as Trustee.

The offering of the notes was registered pursuant to the Corporation's Registration Statement on Form S-3ASR (Registration No. 333-178406), which was previously filed with the Securities and Exchange Commission on December 9, 2011.

Copies of the Underwriting Agreement and the Seventh Supplemental Indenture are filed as exhibits hereto and incorporated herein by reference.

Item 9.01 Financial Statements and Exhibits

(d) Exhibits

4.1 Underwriting Agreement, dated November 1, 2012, among General Dynamics Corporation, the Guarantors named therein and J.P. Morgan Securities LLC, Merrill Lynch, Pierce, Fenner & Smith Incorporated, RBS Securities Inc. and Wells Fargo Securities, LLC, as representatives of the underwriters named therein.

4.2 Seventh Supplemental Indenture, dated as of November 6, 2012, among General Dynamics Corporation, the Guarantors named therein and The Bank of New York Mellon, as Trustee (includes forms of 1.000% Note due 2017, 2.250% Note due 2022 and 3.600% Note due 2042).

SIGNATURES

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

GENERAL DYNAMICS CORPORATION

By: /s/ Kimberly A. Kuryea

Kimberly A. Kuryea
Vice President and Controller
(Authorized Officer and Chief Accounting
Officer)

Dated: November 6, 2012