

# **Clarmont Bloodstock**

## **Premier Racing Partnership**

### **2023-25 Racing Prospectus**

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ClarmontBloodstockClub.com

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Greetings!

Thank you for your interest in Clarmont Bloodstock's 2023 Premier Racing Partnership, commencing during the 2023 Keeneland September Yearling Sale. This partnership is organized and managed by Clarmont's Tyler Clarke and Josh Stevens.

Since 2016, we have celebrated several successes with more than 50 partners from every corner of the United States. Today, we are excited to announce another racing venture that combines our vast experience and focus on service through this boutique racing partnership.

Since the beginning, we have worked hard to foster new and growing owners while providing a secondary investment opportunity for more experienced owners. As such, we encourage all of our partners to get engaged by asking questions, visiting our horses and getting to know fellow partners.

This experience is further supported by our in-depth digital updates that can include routine email updates with photos, videos and notes from the trainer.

This summer, Clarmont Bloodstock will organize a new Limited Liability Company. As a group, we will purchase three to five yearling thoroughbreds with the intent to race in 2024 and 2025.

Last season, we raised \$725,000 and purchased four yearlings, including colts by American Pharoah and City of Light and fillies by Justify and Flameaway. We are pleased to report they are coming along well and should make their debuts later this year.

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This season, we intend to raise \$750,000 to \$1,000,000 with shares based on \$50,000 increments, although we encourage partners to invest more if able. This initial capital contribution would cover expenses through the summer (est. July or August) of their two-year-old season (2024).

Horses will start the training process in the fall of their yearling year in either Kentucky or Florida. In the spring, they will be sent to the trainers based on their individual progress but we will target March to May.

A cash call for ongoing expenses will take place around July or August of their two-year-old season for the next six months of training.

For reference, a typical month should cost \$3,500 (\$115/day) per horse. As an example, four horses in training would cost about \$42,000 per quarter. If there were 32 shares in the partnership (money raised = \$800,000), the quarterly estimate would be \$1,300-1,400 per share. These assessments will take place on an "actual" pro-rata basis.

Monthly bills often include but are not necessarily limited to the following:

- Training, Boarding & Sales Prep
- Routine Veterinary, Surgery & X-Rays
- Farrier (Blacksmith)
- Mortality Insurance
- Transport
- Race and Sale Entry Fees, Standard Trainer/Jockey Fees
- Management Fee
- Administrative (Tax, Legal & Marketing)

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All partners will receive an ongoing expense (and revenue, once applicable) summary which outlines financial activity. Each year, shareholders will receive a tax form K-1. Upon the dissolution of the partnership, each partner will receive a check equal to their share in the sale price, less any final expenses associated with the training, care and sale of the horses.

As Managing Partner, "Clarmont Bloodstock" will make all day-to-day decisions about the club's ownership and management of the thoroughbreds. The partnership will be operated in a manner that maximizes enjoyment and experience while balancing fiscal responsibility by selling or divesting the horses when the opportunity is best. It is our intent, unless there are extenuating circumstances, that the partnership will be closed by December 31st of their three-year-old season (2025).

The fee and commission structure as follows:

- **No mark-ups** on purchase price of the horses and their related expenses or % of purse earnings
- 5% Commission on Funds Raised
- 5% Commission on Public or Private Sales, Stallion Deals, etc.
  - Re: Stallion Deals: Two Breeding Rights to Company, 1 to Trainer
- To deliver a truly outstanding ownership experience, a management fee of \$35 per share per month will be assessed.

To further protect partners' investment, all horses will be insured for mortality. Initial capital contributions must be received by check or wire, along with a signed operating agreement, no later than August 25, 2023 in advance of yearling sales.

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## MEET THE TEAM

### **TYLER CLARKE | Partnership Manager**

Tyler is a graduate of the University of Kentucky, where he completed his B.S. in Equine Science & Management. During that time, he gained valuable experience at the prestigious Shadwell Farm, Gluck Equine Research Center and the University's Maine Chance Farm.

Today, Tyler manages a series of thoroughbred partnerships under the Clarmont umbrella and offers equine mortality insurance through the Clay Ward Agency.

### **JOSH STEVENS | Bloodstock**

Josh takes pride in cultivating new owners and helping them through the learning stages of thoroughbred ownership. He provides a complete range of bloodstock services with a focus on managing clients' complete portfolios.

Josh is a graduate of the University of Louisville, receiving a Bachelor's degree in Equine Industry and Business with a Minor in Finance. After completing the Kentucky Equine Management Internship in 2010, he spent four successful years at Margaux Farm before forming his own bloodstock and consulting firm in 2014.

Josh has purchased horses such as:

- Multiple Grade 1 Winning Millionaire Divisidero

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- Multiple Graded Stakes Winning Millionaire Mr. Money
- Multiple Grade 1 Placed & Stakes Winning Millionaire Breaking Lucky
- Grade 1 Placed & Stakes Winner Mr. Big News
- Multiple Graded Stakes Winning Millionaire By My Standards

***Disclaimer: Thoroughbred investments are inherently high risk in nature. While our purchase, sale and management decisions will be made with financial consequences in mind, Clarmont Bloodstock Club is in no way responsible for financial losses.***

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