

Ulta Salon, Cosmetics & Fragrance, Inc.
Form 8-K
May 10, 2012

UNITED STATES
SECURITIES AND EXCHANGE COMMISSION
WASHINGTON, DC 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): May 9, 2012

ULTA SALON, COSMETICS & FRAGRANCE, INC.

(Exact Name of Registrant as Specified in its Charter)

Delaware
(State or Other Jurisdiction

of Incorporation)

001-33764
(Commission

File Number)

36-3685240
(IRS Employer

Identification No.)

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1000 Remington Blvd., Suite 120

Bolingbrook, Illinois 60440

(Address of Principal Executive Offices)

(Zip Code)

Registrant's telephone number, including area code: (630) 410-4800

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 1.01 Entry into a Material Definitive Agreement.

On May 9, 2012, Ulta Salon, Cosmetics & Fragrance, Inc. (the *Company*) entered into an underwriting agreement (the *Underwriting Agreement*) with Goldman, Sachs & Co. and J.P. Morgan Securities LLC, as representatives of the several underwriters named in Schedule A thereto (collectively, the *Underwriters*), and the selling stockholders named in Schedule B thereto (collectively, the *Selling Stockholders*), relating to the public offering of 7,000,000 shares of the *Company*'s common stock, par value \$0.01 per share, by the *Selling Stockholders* at a public offering price of \$84.00 per share. One of the *Selling Stockholders* also granted the *Underwriters* a 30-day option to purchase an additional 1,050,000 shares of the *Company*'s common stock.

The *Underwriting Agreement* includes customary representations, warranties and covenants by the *Company* and the *Selling Stockholders*. It also provides for customary indemnification by each of the *Company*, the *Selling Stockholders* and the *Underwriters* against certain liabilities and customary contribution provisions in respect of those liabilities. The foregoing description of the material terms of the *Underwriting Agreement* is qualified in its entirety by reference to the full text of the *Underwriting Agreement*, which is filed herewith as Exhibit 1.1 and is incorporated herein by reference.

The *Company* will not receive any proceeds from the sale of shares by the *Selling Stockholders*. The offering is being made pursuant to the *Company*'s effective shelf registration statement on Form S-3 (File No. 333-181205) filed with the Securities and Exchange Commission on May 7, 2012, and the related prospectus supplement and accompanying prospectus. The offering is expected to close on May 15, 2012, subject to customary closing conditions.

Item 9.01 Financial Statements and Exhibits.

(d) Exhibits

| <i>Exhibit No.</i> | <i>Description</i> |
|--------------------|---|
| 1.1 | Underwriting Agreement, dated as of May 9, 2012, by and among the <i>Company</i> , Goldman, Sachs & Co. and J.P. Morgan Securities LLC, as representatives of the several underwriters named in Schedule A thereto, and the selling stockholders named in Schedule B thereto. |

SIGNATURES

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.

ULTA SALON, COSMETICS & FRAGRANCE, INC.

Date: May 10, 2012

By: /s/ Robert S. Guttman
Robert S. Guttman

Senior Vice President, General Counsel and Secretary

EXHIBIT INDEX

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