

Ascena Retail Group, Inc.
Form S-8
December 08, 2017

As filed with the Securities and Exchange Commission on December 8, 2017

Registration No. 333-

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

FORM S-8
REGISTRATION STATEMENT
UNDER
THE SECURITIES ACT OF 1933

ASCENA RETAIL GROUP, INC.

(Exact Name of Registrant as Specified in Its Charter)

Delaware
(State or Other Jurisdiction of
Incorporation or Organization)
933 MacArthur Boulevard

30-0641353
(I.R.S. Employer
Identification No.)
07430

Mahwah, New Jersey
(Address of Principal Executive Offices)

(Zip Code)

Ascena Retail Group, Inc. Employee Stock Purchase Plan
(Amended and Restated Effective as of January 1, 2018)
(Full Title of the Plan)

Copies to:

David Jaffe
Chief Executive Officer
Ascena Retail Group, Inc.
933 MacArthur Boulevard
Mahwah, New Jersey 07430
(Name and Address of Agent for Service)

Steven L. Kirshenbaum, Esq.
Julie M. Allen, Esq.
Proskauer Rose LLP
Eleven Times Square
New York, New York 10036
(212) 969-3000

(551) 777-6700

(Telephone Number, Including Area Code, of Agent For Service)

Indicate by check mark whether the registrant is a large accelerated filer, an accelerated filer, a non-accelerated filer, or a smaller reporting company. See the definitions of large accelerated filer, accelerated filer and smaller reporting company in Rule 12b-2 of the Exchange Act.

Large accelerated filer

Non-accelerated filer (Do not check if a smaller reporting company)

Accelerated filer

Smaller reporting company

Emerging Growth company

If an emerging growth company, indicate by check mark if the registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 7(a)(2)(b) of the Securities Act.

CALCULATION OF REGISTRATION FEE

Title Of Each Class Of Securities	Amount To Be Registered⁽¹⁾	Proposed	Proposed	Amount Of
		Maximum	Maximum	
To Be Registered		Offering Price	Aggregate	Registration Fee
Common Stock, par value \$0.01 per share	4,000,000	\$2.11 ⁽²⁾	\$8,440,000 ⁽²⁾	\$1,050.78 ⁽³⁾

- (1) Represents the additional number of shares of common stock, par value \$0.01 per share (Common Stock) of Ascena Retail Group, Inc. (the Registrant) that may be granted under the Ascena Retail Group, Inc. Employee Stock Purchase Plan (Amended and Restated Effective as of January 1, 2018) (the Plan).
- (2) Calculated solely for purposes of this offering under Rules 457(c) and 457(h) of the Securities Act of 1933, as amended (the Securities Act), on the basis of the average of the high and low selling prices per share of Common Stock on December 5, 2017, as reported on the NASDAQ Stock Market.
- (3) Pursuant to General Instruction E to Form S-8, a filing fee is only being paid with respect to the registration of an additional 4,000,000 shares of Common Stock under the Plan. A prior registration statement on Form S-8 was previously filed by the Registrant s predecessor The Dress Barn, Inc. (the Predecessor Registrant) on November 8, 2006 (Registration No. 333-138506) (the Initial Registration Statement) for the existing securities under the Plan. The Registrant, as the successor registrant to the Predecessor Registrant, adopted the Initial Registration Statement as its own registration statement in accordance with Paragraph (d) of Rule 414 of the Securities Act under Post-Effective Amendment No. 1 to the Initial Registration Statement, filed on January 14, 2011 (Registration No. 333-138506-99).

Explanatory Note

Pursuant to General Instruction E of Form S-8, the Registrant hereby makes the following statement:

This Registration Statement on Form S-8 is filed by Ascena Retail Group, Inc. (the Registrant) to register an additional 4,000,000 shares (the Additional Shares) of the Registrant's common stock, par value \$0.01 per share (Common Stock), which may be awarded pursuant to the Ascena Retail Group, Inc. Employee Stock Purchase Plan (Amended and Restated Effective as of January 1, 2018) (the Plan). The Plan was formerly known as the Ascena Retail Group, Inc. Employee Stock Purchase Plan, and, prior to December 17, 2010, as The Dress Barn, Inc. 2005 Employee Stock Purchase Plan, which was approved by the Board of Directors of the Registrant's predecessor, The Dress Barn, Inc. (the Predecessor Registrant).

The Additional Shares are in addition to the 400,000 shares of the Common Stock previously registered with respect to the Plan by the Predecessor Registrant pursuant to the Registration Statement on Form S-8 (Registration No. 333-138506) filed by the Predecessor Registrant on November 8, 2006 (the Initial Registration Statement). The numbers of shares of Common Stock set forth in the prior sentence reflect adjustments that give effect to the Registrant's two-for-one stock split on April 3, 2012. The Initial Registration Statement was adopted by the Registrant as its own registration statement in accordance with Paragraph (d) of Rule 414 of the Securities Act of 1933, as amended (the Securities Act) under Post-Effective Amendment No. 1 to the Initial Registration Statement (Registration No. 333-138506-99), filed on January 14, 2011 (the Post-Effective Amendment). The Additional Shares increase the aggregate number of shares of Common Stock that may be subject to awards under the Plan from 400,000 to 4,400,000. Pursuant to Instruction E of Form S-8, the contents of the Initial Registration Statement, as amended by the Post-Effective Amendment, are hereby incorporated by reference herein.

PART II

INFORMATION REQUIRED IN THE REGISTRATION STATEMENT

Item 3. Incorporation of Documents by Reference.

The following documents, as originally filed with the Securities and Exchange Commission (the Commission) by the Registrant are hereby incorporated herein by reference:

- (a) the Registrant's Annual Report on Form 10-K for the fiscal year ended July 29, 2017, filed with the Commission on September 25, 2017;
- (b) the description of the Registrant's common stock set forth in the Registrant's Registration Statement on Form S-4/A, filed with the Commission on July 8, 2015;
- (c) the Registrant's Quarterly Report on Form 10-Q for the fiscal quarter ended October 28, 2017, filed with the Commission on December 4, 2017; and

(d) the Registrant's Current Report on Form 8-K, filed with the Commission on December 7, 2017.

All documents filed by the Registrant pursuant to Sections 13(a), 13(c), 14 and 15(d) of the Securities Exchange Act of 1934, subsequent to the effective date of this Registration Statement, prior to the filing of a post-effective amendment to this Registration Statement indicating that all securities offered hereby have been sold or deregistering all securities then remaining unsold, shall be deemed to be incorporated by reference herein and to be part hereof from the date of filing of such documents. In no event, however, will any information that the Registrant discloses under Item 2.02 or Item 7.01 of any Current Report on Form 8-K that the Registrant may from time to time furnish to the Commission be incorporated by reference into, or otherwise become a part of, this Registration Statement. Any statement contained in any document incorporated or deemed to be incorporated by reference herein shall be deemed to be modified or superseded for purposes of this Registration Statement to the extent that a statement contained herein or in any other subsequently filed document which also is or is deemed to be incorporated by reference herein modifies or supersedes such statement. Any such statement so modified or superseded shall not be deemed to constitute a part of this Registration Statement, except as so modified or superseded.

Item 8. Exhibits.

Exhibit Index

Exhibit No.	Description
4.1	<u>Second Amended and Restated Certificate of Incorporation of the Registrant (incorporated by reference to Annex II to the Registrant's proxy statement/prospectus, filed with the Commission on November 18, 2010).</u>

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- 4.2 Certificate of Amendment of Second Amended and Restated Certificate of Incorporation of the Registrant (incorporated by reference to Exhibit 3.1 to the Registrant's Current Report on Form 8-K, filed with the Commission on January 3, 2011).
- 4.3 By-laws of the Registrant, as amended and restated (incorporated by reference to Exhibit 3.1 to the Registrant's Current Report on Form 8-K, filed with the Commission on March 6, 2015).
- 4.4 Amendment to Amended and Restated By-laws of the Registrant (incorporated by reference to Exhibit 3.1 to the Registrant's Current Report on Form 8-K, filed with the Commission on November 3, 2015).
- 5.1 Opinion of Proskauer Rose LLP.*
- 23.1 Consent of Deloitte & Touche LLP.*
- 23.2 Consent of Proskauer Rose LLP (included in Exhibit 5.1).*
- 24.1 Power of Attorney (included on signature page).

* Filed herewith.

SIGNATURES

Pursuant to the requirements of the Securities Act of 1933, the Registrant certifies that it has reasonable grounds to believe that it meets all of the requirements for filing on Form S-8 and has duly caused this Registration Statement to be signed on its behalf by the undersigned, thereunto duly authorized, in the City of Mahwah, State of New Jersey on this December 8, 2017.

ASCENA RETAIL GROUP, INC.

By: /s/ David Jaffe
 Name: David Jaffe
 Title: Chief Executive Officer

POWER OF ATTORNEY

KNOW ALL PERSONS BY THESE PRESENTS that each person whose signature appears below hereby constitutes and appoints David Jaffe and Robb Giammatteo and each of them, acting singly his or her attorney-in-fact and agent, with full power of substitution and resubstitution, for and in such person's name, place and stead, in the capacities indicated below, to sign a Registration Statement on Form S-8 of Ascena Retail Group, Inc. and any and all amendments (including post-effective amendments) thereto, and to file or cause to be filed the same, with all exhibits thereto, and other documents in connection therewith, with the Securities and Exchange Commission, granting unto said attorney-in-fact and agent, full power and authority to do and perform each and every act and thing requisite and necessary to be done in connection therewith, as fully to all intents and purposes as such person might, or could, do in person, hereby ratifying and confirming all that said attorney-in-fact and agent, or his substitute or substitutes, may lawfully do or cause to be done by virtue hereof.

Pursuant to the requirements of the Securities Act of 1933, this Registration Statement has been signed by the following persons in the capacities and on the date indicated.

Signature	Title	Date
/s/ David Jaffe	Chief Executive Officer, Chairman of	December 8, 2017
David Jaffe	the Board of Directors and Director (Principal Executive Officer)	
/s/ Robb Giammatteo	Executive Vice President and	December 8, 2017
Robb Giammatteo	Chief Financial Officer (Principal Financial Officer)	
/s/ Katie J. Bayne	Director	December 7, 2017
Katie J. Bayne		
/s/ Kate Buggeln	Director	December 7, 2017

Kate Buggeln

/s/ Steven L. Kirshenbaum

Director

December 7, 2017

Steven L. Kirshenbaum

-2-

Signature	Title	Date
/s/ Katherine L. Krill Katherine L. Krill	Director	December 7, 2017
/s/ Marc Lasry Marc Lasry	Director	December 6, 2017
/s/ Randy L. Pearce Randy L. Pearce	Director	December 7, 2017
/s/ Stacey Rauch Stacey Rauch	Director	December 7, 2017
/s/ Carl S. Rubin Carl S. Rubin	Director	December 7, 2017
/s/ Linda Yaccarino Linda Yaccarino	Director	December 7, 2017