



# Kentucky Angel Investment Act

## 2021 Qualified Investments (as of 5/6/21)

Small Business	Investor	Date	Investment Status	Projected Investment	Actual Investment	Potential Tax Credit	Actual Tax Credit
451 Tech L.L.C.	Zhang, Wenhui	01/28/21	Inactive	\$1,000,000	-	\$200,000	\$0
CPA Innovations, LLC	Bhatia, Aneeta R.	02/25/21	Investment Made	\$25,000	\$25,000	\$6,250	\$6,250
CPA Innovations, LLC	Hornung, William Keith	02/25/21	Investment Made	\$50,000	\$50,000	\$12,500	\$12,500
CPA Innovations, LLC	McClelland, Martin N.	01/28/21	Investment Made	\$100,000	\$100,000	\$25,000	\$25,000
CPA Innovations, LLC	Richardson, David T.	01/28/21	Investment Made	\$100,000	\$100,000	\$25,000	\$25,000
Cuddle Clones Holdings LLC	Bass, Steven Alan	02/25/21	Investment Made	\$150,000	\$150,000	\$37,500	\$37,500
Cuddle Clones Holdings LLC	Ely III, Hiram	02/25/21	Investment Made	\$50,000	\$50,000	\$12,500	\$12,500
Cuddle Clones Holdings LLC	Jones, Mary Dennis	02/25/21	Investment Made	\$100,000	\$100,000	\$25,000	\$25,000
Cuddle Clones Holdings LLC	McClelland, Martin N.	01/28/21	Investment Made	\$200,000	\$200,000	\$50,000	\$50,000
Cuddle Clones Holdings LLC	Naiser, Steven Todd	02/25/21	Investment Made	\$50,000	\$50,000	\$12,500	\$12,500
Cuddle Clones Holdings LLC	Saunders, Robert S.	01/28/21	Investment Made	\$50,000	\$50,000	\$12,500	\$12,500
Cuddle Clones Holdings LLC	Steinbock, Robert T.	03/25/21	Investment Made	\$50,000	\$50,000	\$12,500	\$12,500
Cuddle Clones Holdings LLC	Steinbock, Robert T.	02/25/21	Investment Made	\$100,000	\$100,000	\$25,000	\$25,000
EdjSports, LLC	Chapman, Gregory Lee	01/28/21	Inactive	\$25,000	-	\$6,250	\$0
EdjSports, LLC	Donnar, Timothy R.	01/28/21	Inactive	\$100,000	-	\$25,000	\$0
EdjSports, LLC	Dugan, Donald J.	01/28/21	Inactive	\$50,000	-	\$12,500	\$0
EdjSports, LLC	Haner, Scott R.	01/28/21	Inactive	\$125,000	-	\$31,250	\$0
EdjSports, LLC	Kirchdorfer Jr, James J.	02/25/21	Inactive	\$100,000	-	\$25,000	\$0
EdjSports, LLC	Kirchdorfer, Mark T.	02/25/21	Inactive	\$100,000	-	\$25,000	\$0
EdjSports, LLC	Klingeman, Jeffrey R.	01/28/21	Inactive	\$25,000	-	\$6,250	\$0

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EdjSports, LLC	Lapinski, Sterling A.	01/28/21	Inactive	\$250,000	-	\$62,500	\$0
EdjSports, LLC	Lunsford, William Bruce	01/28/21	Inactive	\$500,000	-	\$125,000	\$0
EdjSports, LLC	Mintman, Jennifer L.	01/28/21	Inactive	\$25,000	-	\$6,250	\$0
EdjSports, LLC	Perkins III, Herbert W.	01/28/21	Inactive	\$50,000	-	\$12,500	\$0
EdjSports, LLC	Reeves, Patrick J.	01/28/21	Inactive	\$50,000	-	\$12,500	\$0
EdjSports, LLC	Shewmaker, Carl R.	01/28/21	Inactive	\$100,000	-	\$25,000	\$0
EdjSports, LLC	Simpson, Richard O.	01/28/21	Inactive	\$50,000	-	\$12,500	\$0
EdjSports, LLC	Skaggs, Jr., Dale B.	02/25/21	Inactive	\$50,000	-	\$12,500	\$0
EdjSports, LLC	Toutant, Roy T.	01/28/21	Inactive	\$50,000	-	\$12,500	\$0
EdjSports, LLC	Weber, Charles E.	01/28/21	Inactive	\$50,000	-	\$12,500	\$0
EquiLottery LLC	Montano, Miguel O.	03/25/21	Investment Made	\$150,000	\$150,000	\$37,500	\$37,500
EquiLottery LLC	Perkins III, Herbert W.	02/25/21	Investment Made	\$75,000	\$75,000	\$18,750	\$18,750
EquiLottery LLC	Saunders, Robert S.	02/25/21	Investment Made	\$100,000	\$100,000	\$25,000	\$25,000
Hippo Manager Software, Inc.	McClelland, Martin N.	01/28/21	Inactive	\$100,000	-	\$25,000	\$0
Personal Medicine Plus LLC	Kelly Jr., James Paul	03/25/21	Awaiting Investment	\$10,000	-	\$4,000	-
Personal Medicine Plus LLC	Kelly Jr., James Paul	01/28/21	Investment Made	\$50,000	\$50,000	\$20,000	\$20,000
Personal Medicine Plus LLC	Lundberg, Theresa M.	01/28/21	Investment Made	\$50,000	\$50,000	\$20,000	\$20,000
Personal Medicine Plus LLC	Workman, Mark Anthony	03/25/21	Awaiting Investment	\$10,000	-	\$4,000	-
Personal Medicine Plus LLC	Workman, Mark Anthony	01/28/21	Investment Made	\$50,000	\$50,000	\$20,000	\$20,000
PowerTech Water, Inc.	Bork, Daniel P.	03/25/21	Awaiting Investment	\$25,000	-	\$6,250	-
PowerTech Water, Inc.	Hoseus, Michael S.	01/28/21	Investment Made	\$25,000	\$25,000	\$6,250	\$6,250
PowerTech Water, Inc.	Toutant, Roy T.	01/28/21	Investment Made	\$40,000	\$40,000	\$10,000	\$10,000
PowerTech Water, Inc.	Wolford, George Rodney	01/28/21	Investment Made	\$25,000	\$25,000	\$6,250	\$6,250
PowerTech Water, Inc.	Young, Christopher H.	01/28/21	Investment Made	\$100,000	\$100,000	\$25,000	\$25,000
Pyrochem Catalyst Company	Hoseus, Michael S.	01/28/21	Investment Made	\$25,000	\$25,000	\$6,250	\$6,250
Pyrochem Catalyst Company	Streepey, Ben M.	01/28/21	Investment Made	\$15,000	\$15,000	\$3,750	\$3,750
Pyrochem Catalyst Company	Wolford, George Rodney	02/25/21	Investment Made	\$25,000	\$25,000	\$6,250	\$6,250
Pyrochem Catalyst Company	Young, Christopher H.	01/28/21	Investment Made	\$100,000	\$100,000	\$25,000	\$25,000
Vivorte (DE), Inc.	Beanblossom, Brent Christian	02/25/21	Investment Made	\$40,000	\$40,000	\$10,000	\$10,000
Vivorte (DE), Inc.	Chapman, Gregory Lee	01/28/21	Investment Made	\$30,000	\$25,000	\$7,500	\$6,250
Vivorte (DE), Inc.	Hanley, John E.	04/29/21	Awaiting Investment	\$10,000	-	\$2,500	-

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Vivorte (DE), Inc.	Howard, William G.	04/29/21	Awaiting Investment	\$100,000	-	\$25,000	-
Vivorte (DE), Inc.	Nixon, Theodore Halstead	02/25/21	Investment Made	\$50,000	\$50,000	\$12,500	\$12,500
Vivorte (DE), Inc.	Roth, John B.	01/28/21	Investment Made	\$25,000	\$25,000	\$6,250	\$6,250
Vivorte (DE), Inc.	Saunders, Robert S.	01/28/21	Investment Made	\$50,000	\$50,000	\$12,500	\$12,500
Vivorte (DE), Inc.	Stuedle, Joseph A.	01/28/21	Investment Made	\$25,000	\$25,000	\$6,250	\$6,250
Vivorte (DE), Inc.	Stuedle, Margaret Kristin	01/28/21	Investment Made	\$50,000	\$50,000	\$12,500	\$12,500
Wendal Inc	Arrasmith, II, Jerry Joseph	03/25/21	Investment Made	\$30,008	\$30,008	\$7,502	\$7,502
Wendal Inc	Bray, Scott R.	03/25/21	Investment Made	\$10,032	\$10,032	\$2,508	\$2,508
Wendal Inc	Grace, Corey Paul	03/25/21	Investment Made	\$20,020	\$20,020	\$5,005	\$5,005
Wendal Inc	Haas, Eric A.	03/25/21	Investment Made	\$10,032	\$10,032	\$2,508	\$2,508
Wendal Inc	Heidrich, David P.	03/25/21	Investment Made	\$24,992	\$24,992	\$6,248	\$6,248
Wendal Inc	Kienzle, Barry G.	03/25/21	Investment Made	\$49,984	\$49,984	\$12,496	\$12,496
Wendal Inc	Lonnemann, John Michael	04/29/21	Awaiting Investment	\$10,032	-	\$2,508	-
Wendal Inc	Pietromonaco, MaryAnn	04/29/21	Awaiting Investment	\$10,032	-	\$2,508	-
Wendal Inc	Schlotman, John Michael	02/25/21	Investment Made	\$50,000	\$49,984	\$12,500	\$12,496
Wendal Inc	Schroeder, Gregory Lee	02/25/21	Investment Made	\$75,000	\$74,976	\$18,750	\$18,744
Wendal Inc	Verst, Paul T.	03/25/21	Investment Made	\$10,032	\$10,032	\$2,508	\$2,508
Wendal Inc	Zapp, Robert W.	02/25/21	Investment Made	\$50,000	\$49,984	\$12,500	\$12,496
<b>Totals</b>				<b>\$5,430,164</b>	<b>\$2,450,044</b>	<b>\$1,333,041</b>	<b>\$635,011</b>
<b>Maximum Tax Credits Per Calendar Year: \$3,000,000</b>							