



Phoenix Gold
Limited

An Emerging Western Australian Gold Company
Diggers and Dealers 2014 Presentation

JON PRICE
August 2014

Disclaimer

Important information



Statements and material contained in this Presentation, particularly those regarding possible or assumed future performance, production levels or rates, resources or potential growth of Phoenix Gold Limited, industry growth or other trend projections are, or may be, forward looking statements. Such statements relate to future events and expectations and, as such, involve known and unknown risks and uncertainties. Please also see qualifying statements on pages 27 and 28 and Forward Looking Statement on page 29.

This presentation may describe Measured, Indicated and/or Inferred Resources. Inferred Resources have a greater amount of uncertainty as to their existence and greater uncertainty as to their economic feasibility. It cannot be assumed that all or any part of any Inferred Resource will ever be upgraded to a higher category. Exploration is an inherently risky proposition and investors are advised that most exploration projects fail to identify economic resources. The Company has at present not confirmed the economic viability of Inferred Resources at the projects. The Company plans further drilling programs and studies with the objective of confirmation of any deposits and ultimately completing a feasibility study to demonstrate the economics of all Inferred Resources.

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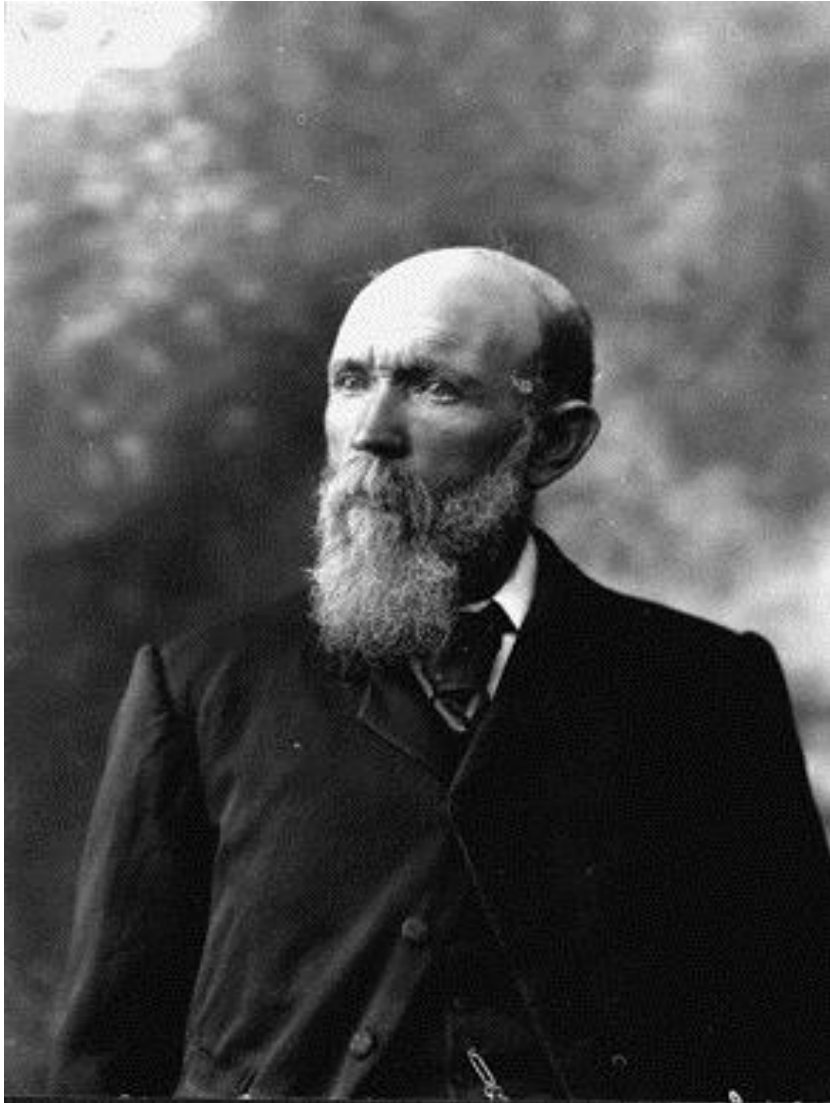
Before making an investment decision, you should consider, with or without the assistance of a financial adviser, whether an investment is appropriate in light of your particular investment needs, objectives and financial circumstances.

Kalgoorlie Goldfields

From humble beginnings to the richest goldfield in Australia



- Gold found in Coolgardie by Bayley and Ford
- Hannan, Flanagan and O'Shea head east
- In June 1893, Hannan files first Reward claim
- ... and the rush begins



Kalgoorlie Goldfields

The WA gold rush started and Kalgoorlie was born



Photos courtesy Kalgoorlie Historical Society

Kalgoorlie Goldfields

Rich history and the gold keeps coming



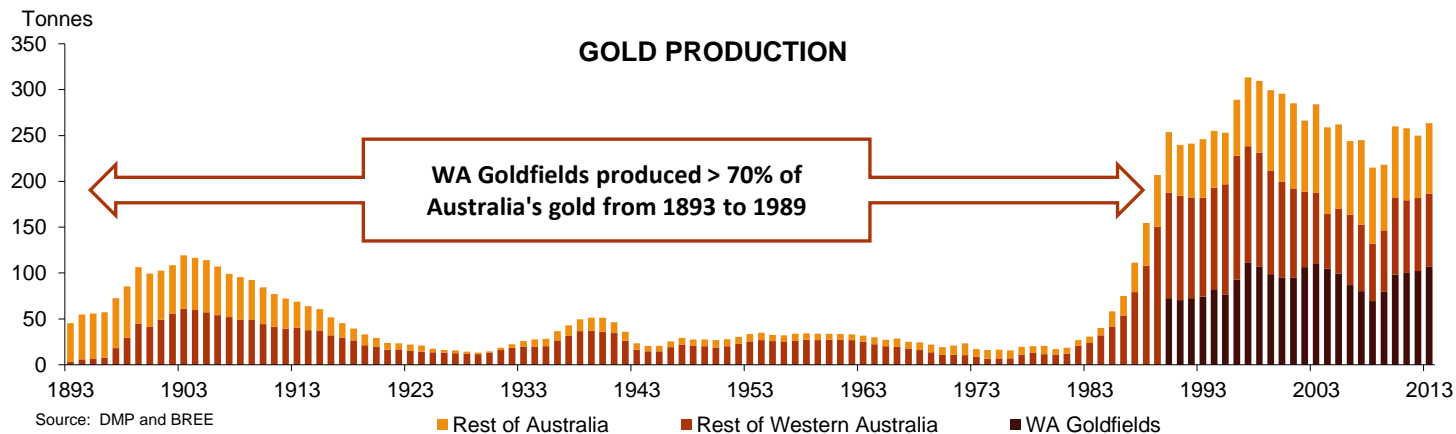
- WA Goldfields has produced ~ 135Moz of gold since 1893
- Super Pit approaching 60Moz
- Even after 120 years of mining, there is still gold in the Kalgoorlie Gold Region

"It seems the simplest thing in the world to find a gold mine.... after you have found it"

David Carnegie (1895)



Russian Jack, one of the many men who walked from Perth to the Goldfields.
Courtesy of West Australian Newspapers uncredited images from archival and contemporary sources.

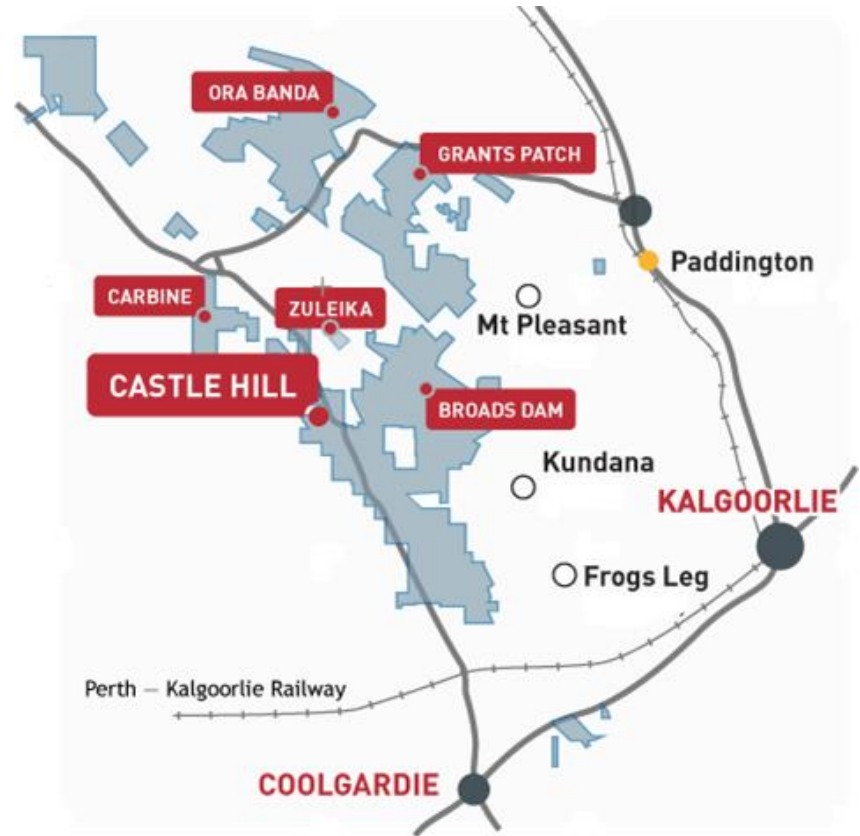


World class region

Gold is still out there



- New processing technology, larger equipment and the digital age enable mining of lower grade material
- Modern exploration techniques enables new discoveries in the region
 - Tropicana to the north east
 - Athena, Hamlet, Neptune and Incredible to the south
 - Pegasus and Castle Hill to the north west
- Phoenix's consolidated projects located within 50 km of Kalgoorlie-Boulder and adjacent to several major gold camps
 - +6Moz Kundana gold camp
 - +4Moz Mt Pleasant field
- Company tenure had little systematic modern exploration over last 20 years



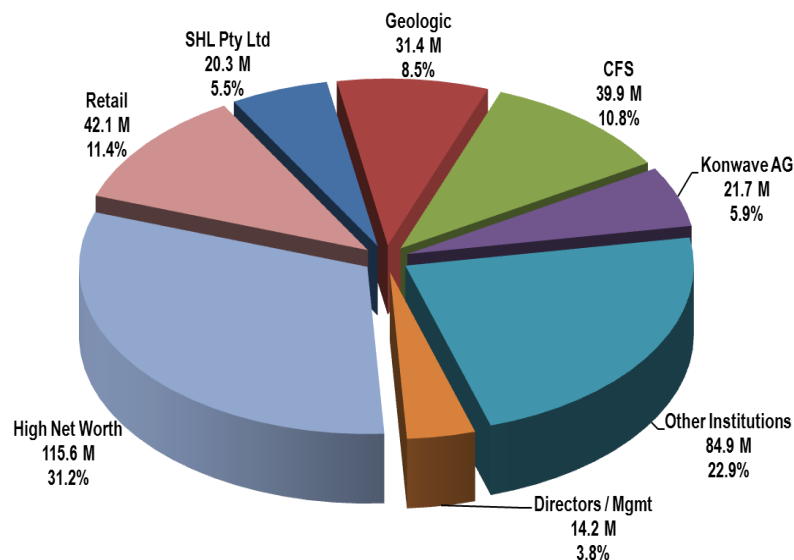
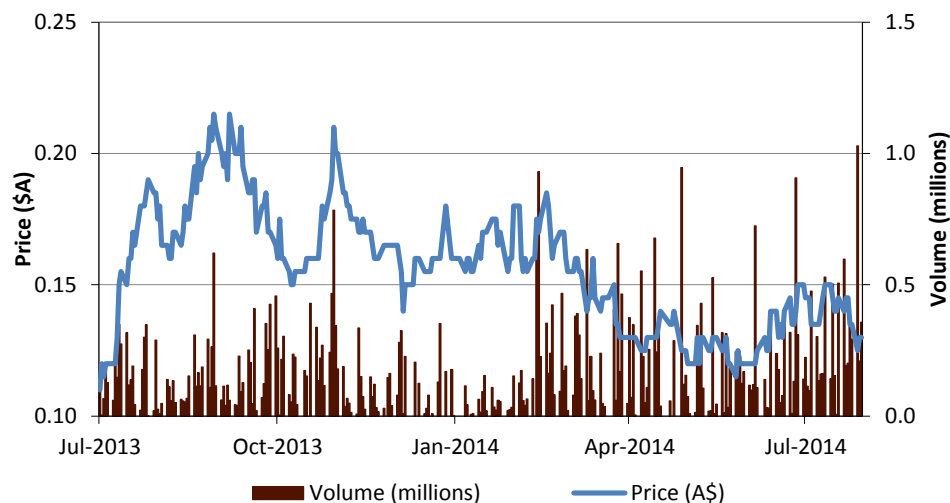
Corporate Overview

Phoenix Gold



ASX Code: PXG, PXGOA

Ordinary shares	370 million
Options (listed/unlisted)	54 million
Market cap (undil.)	~\$50 million
Average daily volume	~300,000
Cash ¹	A\$13.8 million



Directors and Senior Management

Dale Rogers	Non Executive Chairman
Jon Price	Managing Director
Stuart Hall	Non Executive Director
Tim Manners	Chief Financial Officer
Ian Copeland	GM – Exploration
Grant Haywood	Chief Operating Officer

¹ Inclusive of \$4.5m (net of fees) from shortfall placement announced on 16 July 2014



Bringing the Goldfields next producing gold camp on line at Castle Hill

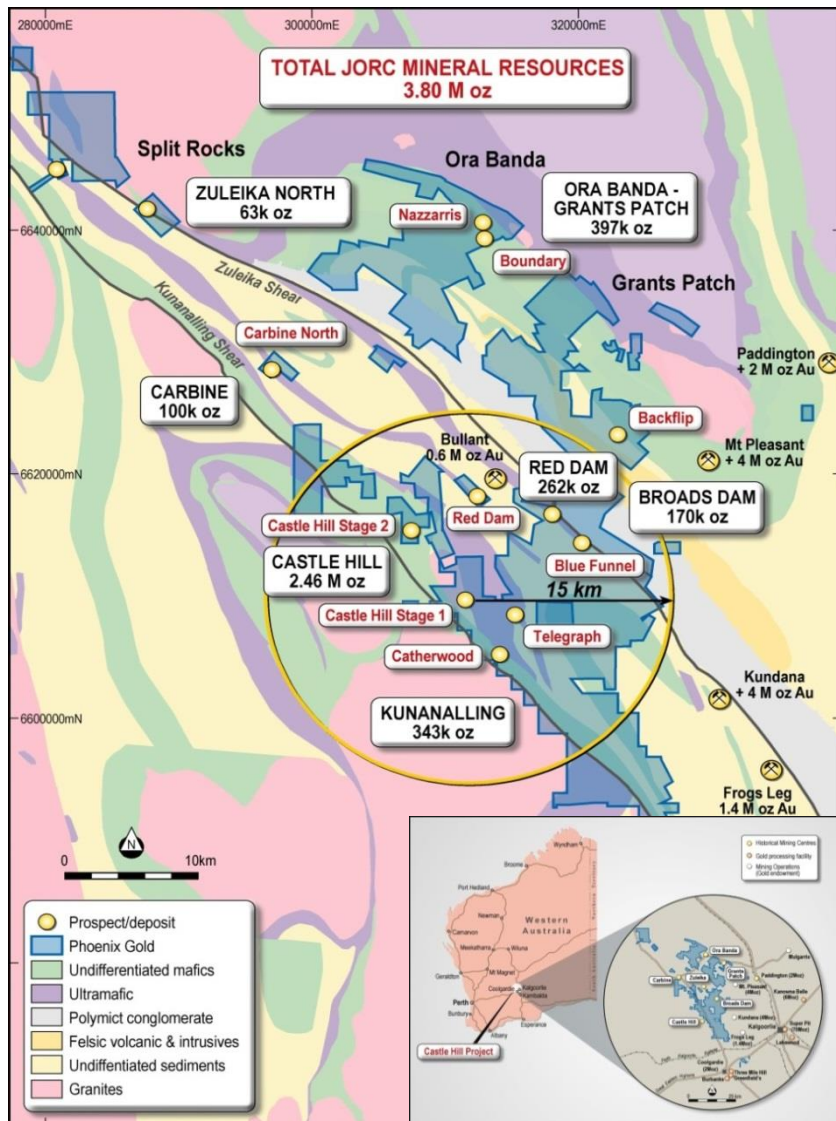
- Consolidated tenure in world class gold producing region
 - Growing Resources of 3.8Moz¹ and Reserves of 1.16Moz¹
- Conventional open cut mining with ore at surface
- Excellent metallurgical recoveries with high gravity component
- Staged development plan adopted to reduce capex , utilise existing infrastructure in the region and generate cash flow for growth
- Initial production 40,000 – 50,000oz pa² utilising 3rd party milling and fully funded
 - Mining commenced with first gold production expected early December Quarter
- Heap leaching adds significant value ... processing plant secured in July 2014
- Castle Hill Stage 1 decision from Norton Gold Fields due early August

¹ Refer slide 25 and 26 , as announced to ASX on 4 February 2014

² Based on Mineral Resources and Ore Reserves as announced to the ASX on 10 and 13 February 2014, see also pages 27 to 29

Tenure

World class shear zones



2 world class shear zones

– Kunanalling Shear

- Historic drilling limited to top 80m
- Modern structural geology absent
- Home to the **Castle Hill** gold project

– Zuleika Shear

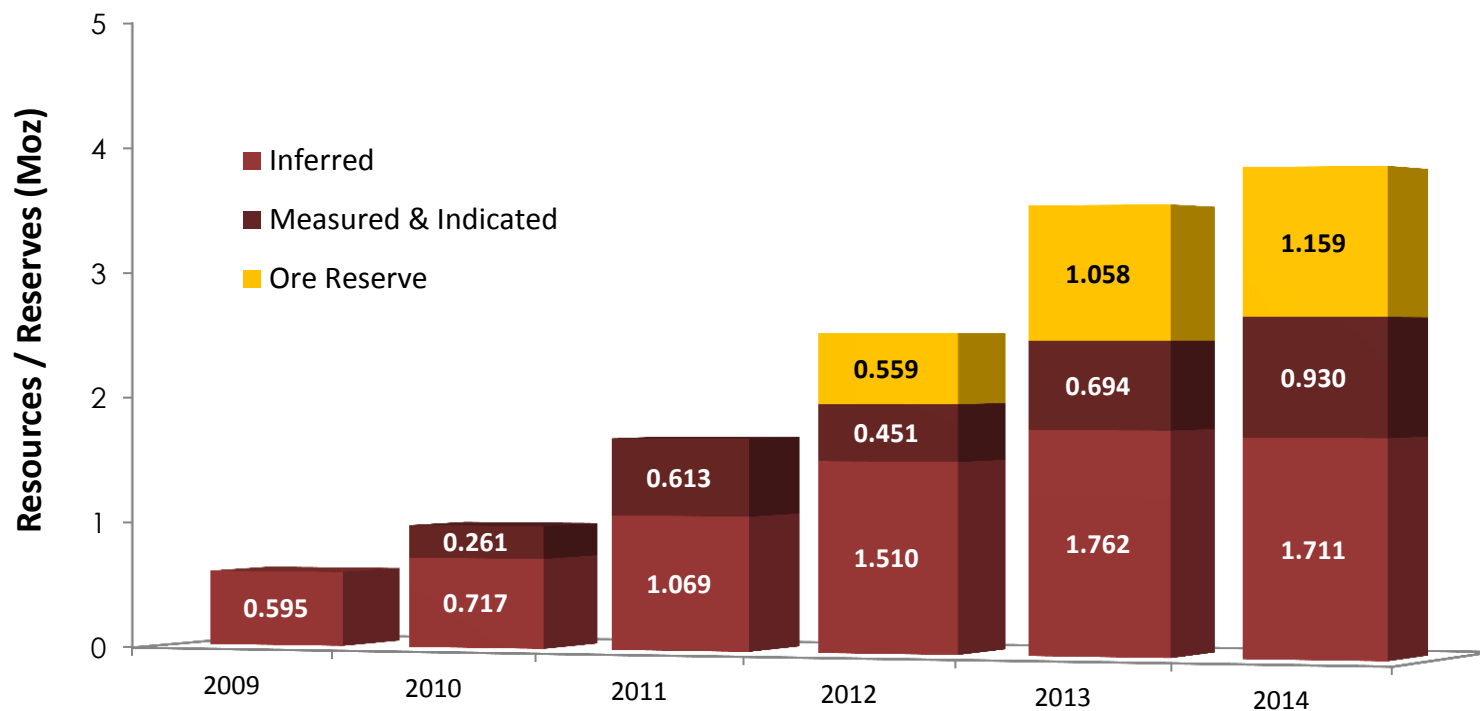
- Higher grade open pit and underground potential
- Home to **Broads Dam** and **Kundana North**, untested along strike and at depth
- 3Moz within 15 km radius, 100% owned
- Conventional open cut mining
- Free milling ore with excellent metallurgy
- Close to required services and infrastructure
- Drive in-drive out of Kalgoorlie-Boulder

Resource and Reserve Growth

Consistently delivered year on year growth



- Current Resource 3.8Moz including 1.16Moz reserve¹
- Ongoing exploration and conversion drilling to drive organic growth



Definitive Feasibility Study

Robust underlying results of standalone project¹



- DFS completed on core projects at Castle Hill, Red Dam and satellite pits
- Assumed standalone project - Phoenix owned processing plant for higher grade ore and heap leach plant for lower grade ore

Headline results		
Total gold production	ounces	1,036,400
Mine life	years	8
Average annual gold production	ounces	129,550
Development time to first production	months	18
Total up front project capital cost (includes \$30m HL in year 2/3)	A\$M	136
All in sustaining cash costs	A\$/oz	989
Key financial results (at A\$1350 per ounce)		
Total Revenue	A\$M	1,399
Total net cash flow (after capex, before tax)	A\$M	264
NPV at 6% (pre-tax)	A\$M	153
Internal rate of return (IRR) over mine life (pre-tax)	%	30

¹ As announced to ASX on 10 and 13 February 2014

Staged development plan

Board approved option



- Several processing plants with spare capacity in the region
- Accelerated production and cash flow and reduced development risk
- Options retained to deliver DFS outcome with improved shareholder return

	DFS	Staged approach
Upfront capital cost	\$106 Million	\$1 – 6 Million
Assumed debt	\$60 – 70 Million	\$ Nil
Payback period	Approx. 5 years	Approx. 3 months
First gold pour from investment	18 months	3 – 6 months
Estimated cash flow over next 2-3 yrs	\$nil (all cash to banks)	\$18 – 20 Million

Work outlined for 2014

Deliver on the staged approach



Phoenix Priorities – a three pronged approach

1. Secure a mill in the region and commence mining and ore processing
 - Improve geological confidence by completing grade control drilling up front
 - Minimise capital costs and engage contractors on competitive rates
 - Utilise existing infrastructure and local workforce
2. Work on a JV with Norton to mine and mill Castle Hill Stage 1
 - Feasibility Studies delivered to Norton in February
 - Technical group working on formal mining agreement
3. Develop a heap leach to treat lower grade ore from Castle Hill
 - Secure a fit for purpose stand-alone processing facility
 - Complete further test work to confirm amenability

1. Mill secured

and previously utilised by management



Two year milling deal signed with FMR Investments

- Contract to treat 600 - 800ktpa through Greenfields Mill 27 km to the south
- Phoenix ore will be processed in campaigns with no third party blending
- Payment will be on an open book, cost plus basis at very competitive rates
- Mill to be operated under technical direction of Phoenix staff
- Agreement can be extended and Phoenix has right to match any purchase offer

Key operating results – mill feed through Greenfields Mill¹

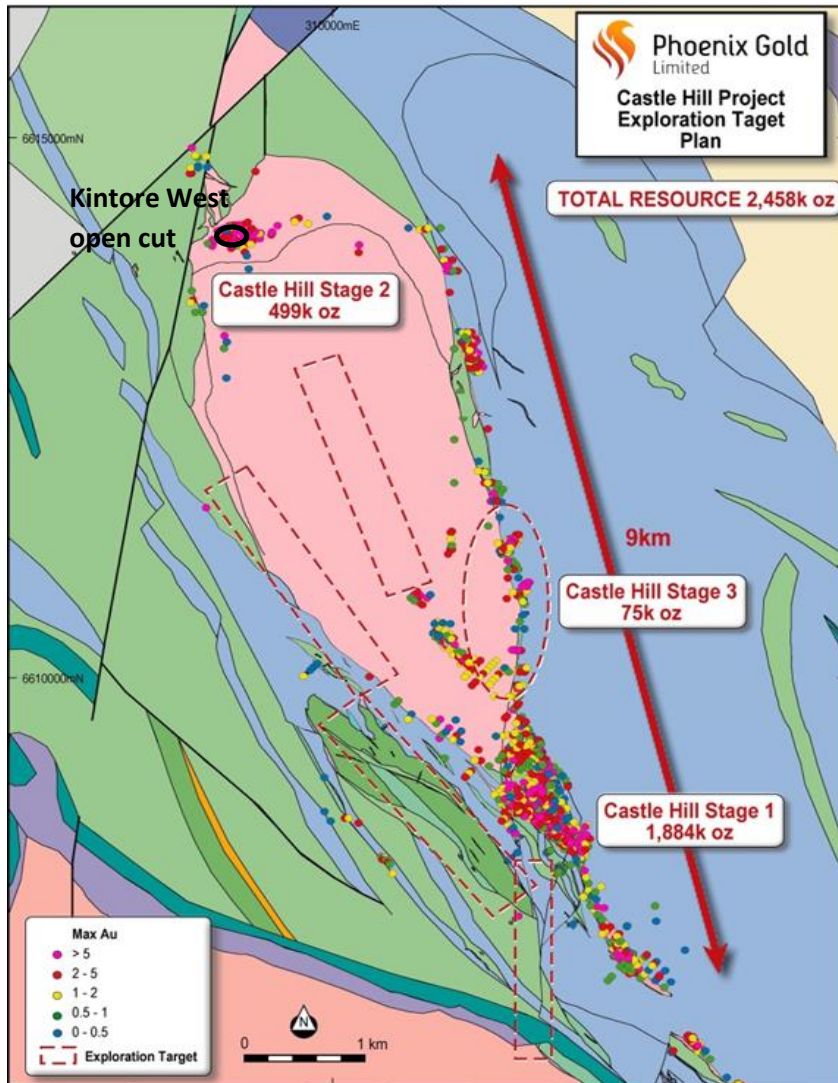
Ore tonnes processed	kt	600 - 800
Projects grade range	g/t Au	1.9 - 2.4
Gold recovery	%	94
Estimated annual gold production ²	ounces	40,000 - 50,000
Development time to first production	months	2
Mine development capital cost range	A\$M	1 - 6

¹ Refer slide 25 and 26 , as announced to ASX on 4 August 2014

² Based on Mineral Resources and Ore Reserves as announced to the ASX on 10 and 13 February 2014, see also pages 27 to 29

1. Mining commences

Kintore West open pit (Castle Hill Stage 2)



- ✓ Mining and haulage contracts awarded and equipment mobilised
- ✓ Native Title and mining approvals in place
- ✓ Mining commenced at Kintore West¹
 - Grade control drilling complete
 - Initial pit mines 380kt at 2g/t for 23,000 ounces recovered
 - Generates 900kt of heap leach feed at 0.6g/t
- ✓ Sequence of open cut mines planned
 - Kintore West and potential cut backs
 - Burgundy (Telegraph project area)
 - Red Dam stage 1

¹ Refer slide 25 and 26 , as announced to ASX on 4 August 2014

2. License to mine option with Norton

Castle Hill Stage 1



Feasibility Studies provided and under review

- Generates A\$18m cash for Phoenix over 18 months at A\$1,400/oz gold price
- Open pit produces 142,000oz at 2.03g/t
- Mine development funded by Norton

Combined technical group meets weekly

- Formal agreement drafted and production costs assumptions under review

Decision from Norton required by early August 2014

- Mining to commence within three months of formal agreement execution
- Once off opportunity likely to be taken up by Norton

3. Unlocking heap leach potential

2.3Mtpa HL processing plant secured



Castle Hill mining can generate over 2Mtpa HL feed

- For every tonne of mill feed mined, one tonne of HL feed is mined
- Mining cost of HL ore is carried by the high grade ore

Agreement to acquire St Ives heap leach plant for A\$2m

- Rated at 2.3Mtpa capacity and on care and maintenance in the Goldfields
- Circuit design compatible for Phoenix ore

Latest test work confirms historic results at Castle Hill

- Three stage crushing and agglomeration yields 72-88% recovery
- Excellent heap leach amenability, percolation and reagent consumption

Updated Engineering study and project financing underway

- Preliminary study generates 25-30,000oz¹ per annum for ~A\$25m CAPEX

Complementary heap leaching¹

Extract value from low grade stockpiled ore



- **Extract value from low grade stockpiled ore**
- 2Mtpa at 0.6g/t Au
- Contract 3 stage crushing
- Agglomerate, stack
- Pregnant solution to dedicated CIC plant
- 25-30,000oz pa production
- 70% recovery
- Capital cost estimated at A\$25m
- Opex – A\$11.25/t

¹ Refer slide 25 and 26. As announced to ASX on 10 and 13 February 2014

Staged development plan

Initial 2 year production profile

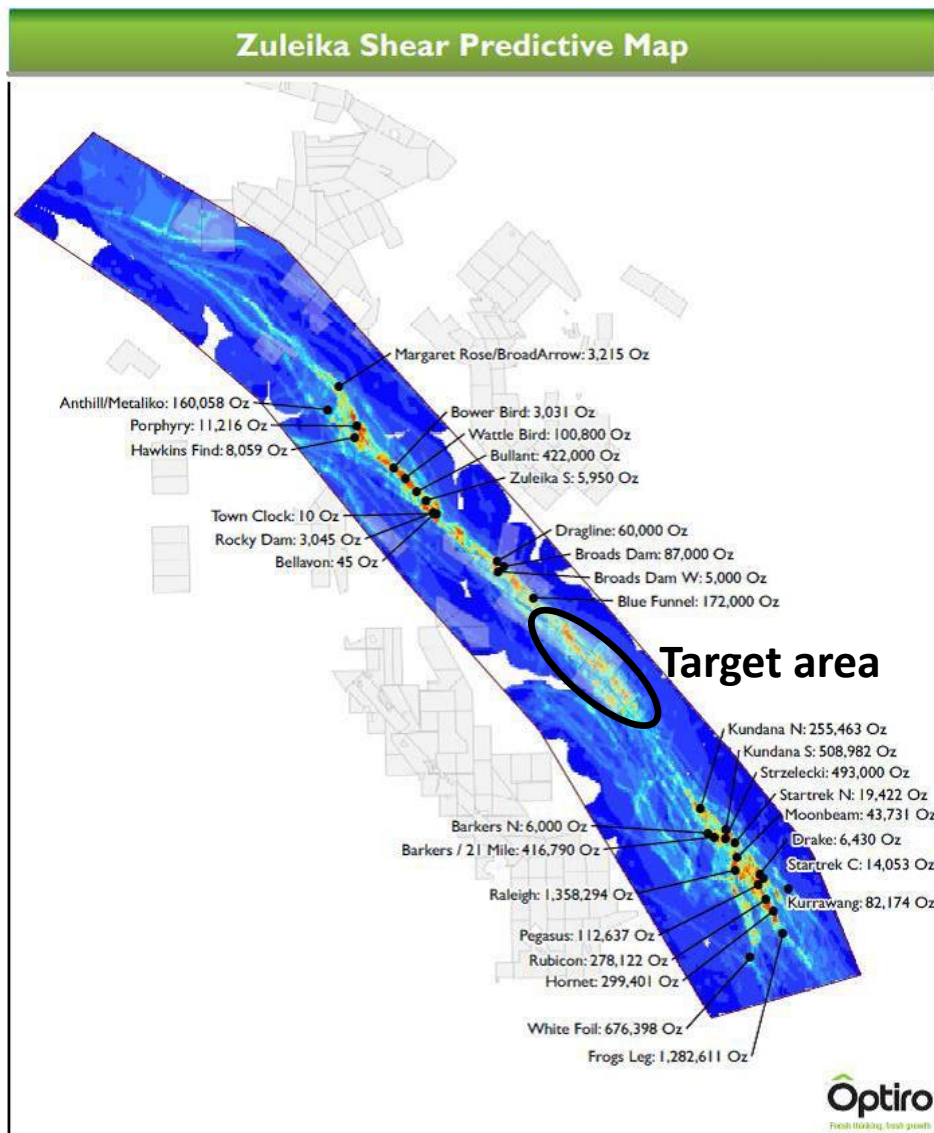


Sequence of mines developed by Phoenix for milling and heap leaching

- 100%-owned
- Conventional truck and shovel open cut mining
- Excellent metallurgy with test work mill recoveries ranging 90% - 96%
- Castle Hill ore treated at Greenfields previously delivered 95.2% recovery with coarse grind of >125um and over 40% gravity recovery
- Plan delivers 65 – 80,000oz of gold production in first 2 years¹
 - Milling at 600,000 tonnes per annum
 - Heap leaching at 2M tonnes per annum commencing H1 CY 16
- Current cash reserves and cash flow from operations to fund exploration, purchase and dismantling of the recently acquired heap leach plant from St Ives Gold Mining Company

Exploration upside

Significant organic growth within current tenement holding



- 3D evolution study nearing completion with University of Western Australia's Centre for Exploration targeting
- Predictive modeling complete and target priorities identified
- Zuleika Shear zone has now discovered and mined over 8Moz of gold
- Target area has similar geological setting and has had little to no modern exploration
- Exploration planned at both the Kundana North project area and Castle Hill early in 2015

In closing

Production and growth ready in 2014



- **Western Australia is a stable jurisdiction with declining costs of production**
- Phoenix has a consolidated land holding and a 3.8Moz Resource base
- Infrastructure, mining services and labour available locally
- Conventional open cut mining and proven milling technology
- 3 pronged, staged approach with low capital cost and flexibility in a tough market
- Third party milling to provide 40,000 - 50,000oz per annum¹
- Norton agreement over Castle Hill Stage 1 can potentially generate \$15-20m over 18 months²
- Heap leach plant secured and can generate 25,000 – 30,000oz per annum¹
- Significant exploration potential at Castle Hill and Kundana North
- **The WA Goldfields – time to take another look**

... Visit us at booth 114 (and take a site tour to see for yourself)

¹ Refer slide 25 and 26, as announced to ASX on 10 and 13 February 2014¹

² Based on Mineral Resources and Ore Reserves as announced to the ASX on 10 and 13 February 2014, see also pages 27 to 29

Our Gold Industry

A significant contributor to our State and regional communities



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Thank you

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August 2014

JORC Mineral Resources¹

2014



Project (Mill Feed)	Measured Mineral Resource			Indicated Mineral Resource			Inferred Mineral Resource			Total Mineral Resource		
	Mt	Au (g/t)	Au Oz	Mt	Au(g/t)	Au oz	Mt	Au (g/t)	Au Oz	Mt	Au (g/t)	Au Oz
Castle Hill (Stage 1 - Mill)				18.09	1.5	894,000	7.64	1.3	317,000	25.73	1.5	1,211,000
Kintore (Castle Hill Stage 2)				2.38	1.5	116,000	3.17	1.6	167,000	5.55	1.6	283,000
Castle Hill Stage 3	0.18	3.5	20,000	0.15	3.1	15,000	0.67	1.9	40,000	1.00	2.3	75,000
Red Dam				2.46	2.0	155,000	2.02	1.6	107,000	4.48	1.8	262,000
Broads Dam				0.13	2.9	12,000	2.16	2.3	158,000	2.29	2.3	170,000
Kunanalling	0.41	2.4	32,000	1.33	1.6	69,000	4.40	1.7	242,000	6.14	1.7	343,000
Ora Banda				3.11	1.9	187,000	3.52	1.9	210,000	6.63	1.9	397,000
Carbine				1.70	1.6	86,000	0.21	2.1	14,000	1.91	1.6	100,000
Zuleika North				0.51	2.5	41,000	0.27	2.5	22,000	0.78	2.5	63,000
Total	0.59	2.7	52,000	29.86	1.6	1,575,000	24.06	1.7	1,277,000	54.51	1.7	2,904,000

Project (Heap leach feed)	Measured Mineral Resource			Indicated Mineral Resource			Inferred Mineral Resource			Total Mineral Resource		
	Mt	Au (g/t)	Au Oz	Mt	Au(g/t)	Au oz	Mt	Au (g/t)	Au Oz	Mt	Au (g/t)	Au Oz
Castle Hill (Stage 1 - HL)				21.54	0.6	400,000	15.07	0.6	273,000	36.61	0.6	673,000
Kintore (Castle Hill Stage 2)				3.03	0.6	55,000	9.05	0.6	161,000	12.08	0.6	216,000
Stockpiles				0.20	1.1	7,000				0.20	1.1	7,000
Total				24.77	0.6	462,000	24.12	0.6	434,000	48.89	0.6	896,000

Total FEB 2014	0.59	2.7	52,000	54.63	1.2	2,037,000	48.18	1.1	1,711,000	103.40	1.1	3,800,000
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¹As announced on 4 February 2014

Notes:

1. Stockpiles report material mined from historical mining operations at Lady Jane, Broads Dam, Premier, Catherwood, Bluebell, Mick Adam and Shamrock.
2. See slide 18 and 19 for Competent Persons /Qualification Statements.
3. The Company confirms that it is not aware of any new information or data that materially affects the information included in the original market announcement.

JORC Ore Reserves¹

2014



Project - Mill Feed	Proven Ore Reserve			Probable Ore Reserve			Total Ore Reserve			Cut off
	Mt	Au (g/t)	Au Oz	Mt	Au(g/t)	Au oz	Mt	Au (g/t)	Au Oz	g/t
Castle Hill (Stage 1)				10.68	1.71	588,380	10.68	1.71	588,380	0.8
Kintore (Castle Hill Stage 2)				2.00	1.33	86,100	2.00	1.33	86,100	0.8
Red Dam				1.60	2.19	110,900	1.60	2.19	110,900	1.0
Kunanalling	0.35	2.09	24,000	0.02	1.63	1,000	0.37	2.07	25,000	0.9
Ora Banda				0.58	2.33	44,000	0.58	2.33	44,000	0.8
Carbine				0.40	1.70	23,800	0.40	1.70	23,800	1.0
Sub total - mill feed	0.35	2.09	24,000	15.28	1.74	854,180	15.63	1.75	878,180	
Project - Heap leach feed										
Castle Hill				12.16	0.58	227,450	12.16	0.58	227,450	0.4-0.8
Kintore (Castle Hill Stage 2)				2.60	0.54	46,000	2.6	0.54	46,000	0.4-0.8
Stockpiles				0.20	1.10	7,000	0.20	1.10	7,000	
Sub total - Heap leach feed				14.96	0.58	280,450	14.96	0.58	280,450	
Total	0.35	2.09	24,000	30.24	1.17	1,134,630	30.59	1.18	1,158,630	

¹As announced on 4 February 2014

Notes: The reserve estimates have been modified with dilution and mining recovery factors

Tonnes and ounces are rounded, rounding errors may occur

MT = million tonnes, Au (g/t) = gold in grams per tonne

See slides 27 to 29 for Competent Persons /Qualification Statements

The Company confirms that it is not aware of any new information or data that materially affects the information included in the original market announcement

Qualification Statements

Important information



- The information in this report that relates to Ore Reserves relating to Castle Hill is based on information compiled by Mr Glenn Turnbull who is a Fellow of the Institute of Material, Minerals and Mining. Mr Glenn Turnbull is a full time employee of Golder Associates Ltd and has sufficient experience which is relevant to the engineering and economics of the types of deposits which are covered in this report and to the activity which he is undertaking to qualify as a Competent Person as defined in the 2012 edition of the 'Australian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves'. Glenn Turnbull consents to the inclusion in this report of matters based on his information in the form and context in which it appears.
- The information in this report that relates to Ore Reserves other than Castle Hill is based on information compiled by Mr William Nene who is a member of The Australian Institute of Mining and Metallurgy. Mr William Nene is a full time employee of Goldfields Mining Services Pty Ltd and has sufficient experience which is relevant to the engineering and economics of the types of deposits which are covered in this report and to the activity which he is undertaking to qualify as a Competent Person as defined in the 2004 edition of the 'Australian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves'. William Nene consents to the inclusion in this report of matters based on his information in the form and context in which it appears.
- The information in this report that relates to Mineral Resource Estimation for Castle Hill Stage 1 and Red Dam is based on information compiled by Mr Brian Fitzpatrick, Senior Consulting Geologist for Cube Consulting. Mr Fitzpatrick is a Member of the Australasian Institute of Mining and Metallurgy and is also an accredited Chartered Professional Geologist. Mr Fitzpatrick has sufficient experience which is relevant to the style of mineralisation and type of deposit under consideration to qualify as a Competent Person as defined in the 2012 Edition of the "Australasian Code for Reporting of Exploration Results, Mineral resources and Ore Reserves" (JORC Code). Mr Fitzpatrick consents to the inclusion in this report of the matters based on their information in the form and context in which it appears.

Qualification Statements

Important information



- The information in this report that relates to Exploration Results and other Resources are based on information compiled by Ian Copeland who are employees of the company. and fairly represent this information. Mr Copeland is a Member of the Australasian Institute of Mining and Metallurgy. Mr Copeland has sufficient experience of relevance to the styles of mineralisation and the types of deposits under consideration, and the activities undertaken, to qualify as Competent Persons as defined in the 2012 Edition of the Joint Ore Reserves Committee (JORC) Australasian Code for Reporting of Exploration Results, Mineral Resources and Ore Reserves. Ms Money and Mr Copeland consent to inclusion in this report of the matters based on their information in the form and context in which it appears.
- The Competent Persons in relation to the Ore Reserves, on which the production target is based, confirm that that the estimated ore reserves underpinning the production target have been prepared in accordance with the requirements in Appendix 5A of the Listing Rules (JORC Code).
- The production target is based on relevant proportions of Probable Ore Reserves and Proven Ore Reserves as detailed in the Table 5 on page 11 of the announcement dated 10 February 2014 and on page 16 and 17 in this presentation.
- In relation to the ASX announcement on 4 February 2014 regarding Mineral Resources and Ore Reserves, the Company confirms that it is not aware of any new information or data that materially affects the information included in the original market announcement.

Forward looking statements

Important information



This release contains forward-looking statements. Wherever possible, words such as "intends", "expects", "scheduled", "estimates", "anticipates", "believes", and similar expressions or statements that certain actions, events or results "may", "could", "would", "might" or "will" be taken, occur or be achieved, have been used to identify these forward-looking statements. Although the forward-looking statements contained in this release reflect management's current beliefs based upon information currently available to management and based upon what management believes to be reasonable assumptions, The Company cannot be certain that actual results will be consistent with these forward-looking statements. A number of factors could cause events and achievements to differ materially from the results expressed or implied in the forward-looking statements. These factors should be considered carefully and prospective investors should not place undue reliance on the forward-looking statements. Forward-looking statements necessarily involve significant known and unknown risks, assumptions and uncertainties that may cause the Company's actual results, events, prospects and opportunities to differ materially from those expressed or implied by such forward-looking statements. Although the Company has attempted to identify important risks and factors that could cause actual actions, events or results to differ materially from those described in forward-looking statements, there may be other factors and risks that cause actions, events or results not to be anticipated, estimated or intended, including those risk factors discussed in the Company's public filings. There can be no assurance that the forward-looking statements will prove to be accurate, as actual results and future events could differ materially from those anticipated in such statements. Accordingly, prospective investors should not place undue reliance on forward-looking statements. Any forward-looking statements are made as of the date of this release, and the Company assumes no obligation to update or revise them to reflect new events or circumstances, unless otherwise required by law. This release may contain certain forward looking statements and projections regarding: estimated resources and reserves; planned production and operating costs profiles; planned capital requirements; and planned strategies and corporate objectives.

Such forward looking statements/projections are estimates for discussion purposes only and should not be relied upon. They are not guarantees of future performance and involve known and unknown risks, uncertainties and other factors many of which are beyond the control of the Company. The forward looking statements/projections are inherently uncertain and may therefore differ materially from results ultimately achieved. The Company does not make any representations and provides no warranties concerning the accuracy



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Supporting slides

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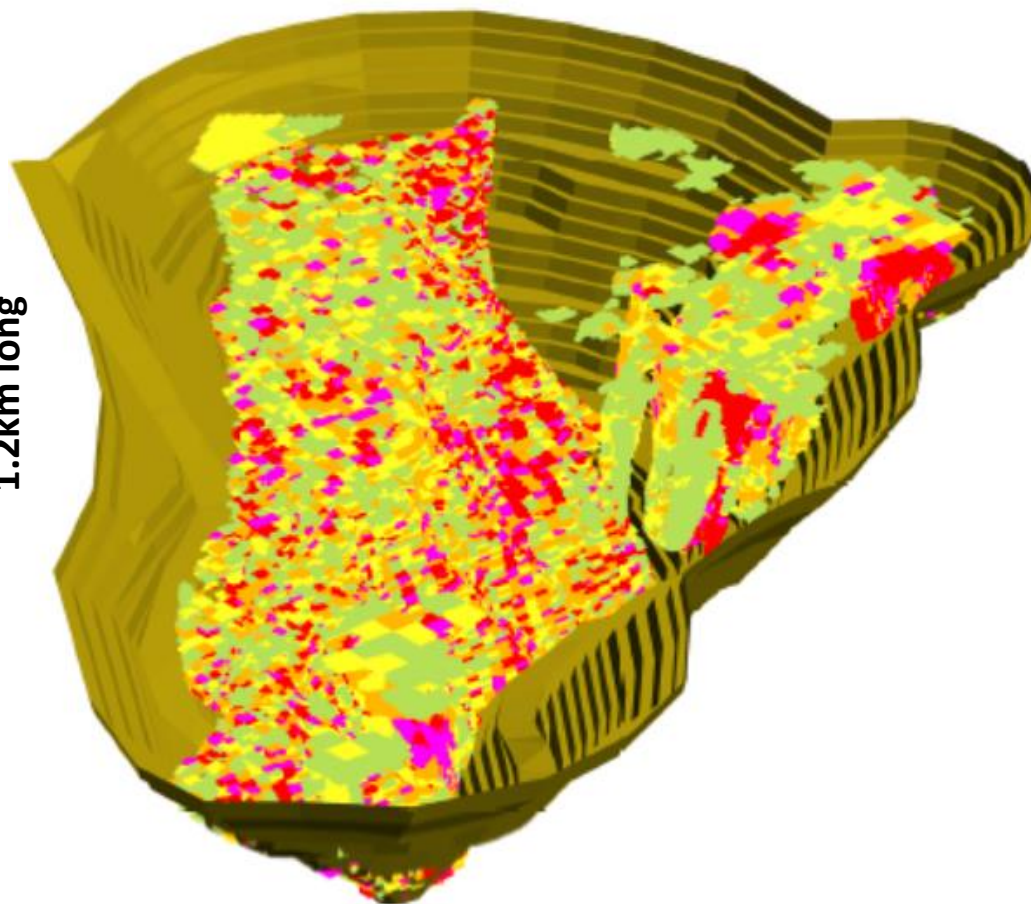
Conventional open cut mining¹

Supporting information



500m wide

1.2km long



Mick Adam open cut schematic – 200m depth

- Castle Hill base load feed stock
- Conventional truck and shovel open cut mining (contract)
- Ore starts close to surface
- Mick Adam pit delivers:
 - 12Mt at 1.7g/t Au
 - 11Mt at 0.6g/t Au
 - Mine life of 6yrs
 - Oxide /transitional ore for first 2 years
 - Strip ratio 5:1
- Average mining cost overall
 - \$7.60/ bcm
 - \$3.22 /total t mined
 - 28.50/ore t milled

The Board

Supporting information



- **Dale Rogers – Non Executive Director (Chairman)**
 - Mining engineer with almost 30 years experience in project development, operations and financing. Developed and managed operations in Australia and overseas.
- **Stuart Hall – Non Executive Director**
 - Geologist with over 40 years experience in exploration and mining projects in Australia, Africa and SE Asia. Broad experience across a wide range of commodities in the areas of exploration, mine geology, open cut and underground operations and resource and reserve estimation
- **Jon Price – Managing Director**
 - Metallurgist with over 25 years experience in the gold sector. Developed several new open cut and underground operations near Kalgoorlie and project managed milling and heap leaching projects in Australia and overseas. Former GM at Paddington and St Ives gold mines in the Goldfields.
- **Ian Gregory – Company Secretary**
 - Consultant with over 30 years experience in the provision of company secretarial and business administration services to listed and unlisted companies.



- **Tim Manners – Chief Financial Officer**
 - Chartered Accountant with almost 20 years experience in the resources sector covering management accounting, corporate and project financing. Former CFO of Bathurst Resources, Perilya Ltd and Western Areas NL.
- **Grant Haywood – Chief Operating Officer**
 - Mining Engineer with over 20 years experience in feasibility studies, mine and mill development and operations management. Former GM operations at Saracen Minerals.
- **Ian Copeland – GM - Exploration**
 - Geologist and Mining Engineer with over 25 years experience in the Goldfields region. Worked as Geology/Exploration Manager with Barrick Gold, Goldfields Ltd and Placer Dome with vast experience in the Kunanalling/ Zuleika project area.