

**GoldOz Limited**

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6 May 2022

GOLDOZ LIMITED – PRIORITY OFFER

Dear Shareholder

As announced to the ASX on 2 May 2022, GoldOz Limited (“**GoldOz**” or the “**Company**”) has lodged its Prospectus for an offer of 27.5 million shares at an issue price of \$0.20 per share to raise \$5.5 million (**Offer**). Capitalised terms used but not defined in this notification have the same meaning given to them in the Prospectus dated 2 May 2022 and lodged with ASIC and ASX on that date.

The Offer comprises:

- a priority offer of up to 3,750,000 Shares to Eligible Shareholders to raise up to \$750,000 (**Priority Offer**); and
- a general offer of up to 23,750,000 Shares to raise a further \$4,750,000, together with any shortfall under the Priority Offer (**General Offer**).

For the purposes of the Priority Offer, “Eligible Shareholder” means a registered shareholder of the Company as at 5:00pm WST on 2 May 2022, that is resident in Australia.

As an Eligible Shareholder under the Priority Offer, you are entitled to apply for shares under the Priority Offer. If you do not wish to apply for shares under the Priority Offer, you are not obliged to do anything.

The final allocations of shares under the Offer remains at the sole discretion of the Directors of GoldOz to ensure that GoldOz has an appropriate shareholder base on admission to the Official List of ASX. There is no assurance that any applicant will be allocated any shares, or the number of shares for which it has applied.

The closing date for the Priority Offer is 5:00pm (WST) on 8 June 2022 (**Closing Date**), or such earlier or later date as the directors, in their absolute discretion, may determine. The Company reserves the right to extend the Priority Offer Closing Date or close the Priority Offer early without notice.

Further details of the Offer are set out in the Prospectus, and you should read it before deciding whether to participate in the Offer.

You can view the Prospectus and the online Application Form for the Priority Offer at: <https://GoldozPriorityOffer.thereachagency.com>

If you have multiple holdings of GoldOz shares, you will receive an email for each holding in respect of which you have elected electronic communications.

For more information, please contact the Company at any time between 8.00am and 5.00pm (AWST) Monday to Friday on +61 8 9217 2400.

Applications and Payment must be received by the Closing Date.

Thank you for your continued support as a shareholder.

The Company confirms that this announcement has been authorised and approved by its Board.





GOLDOZ

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FOR FURTHER INFORMATION, PLEASE CONTACT:

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