Nevada Division of Minerals

2018 NEVADA MINERAL PRODUCTION,
NEW OPERATIONS, CRITICAL MINERALS, AND A
STUDY ON PRECIOUS METALS ORE TOLLING AND
COPPER CONCENTRATE PROCESSING

Mineral Processing Division of SME

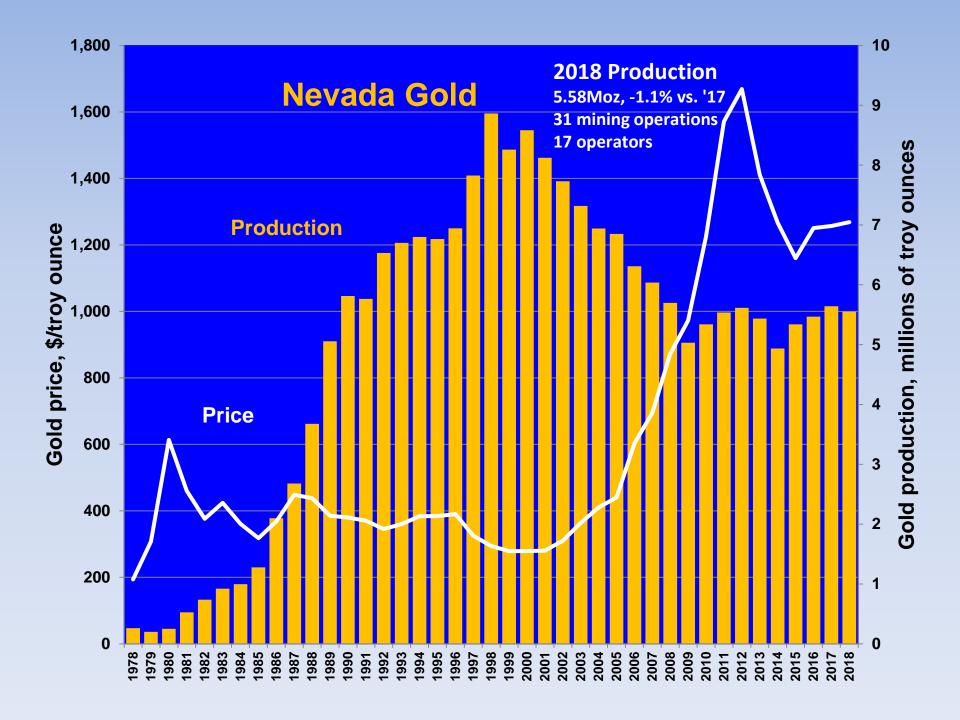
Reno, NV

October 4, 2019

Richard Perry, Administrator

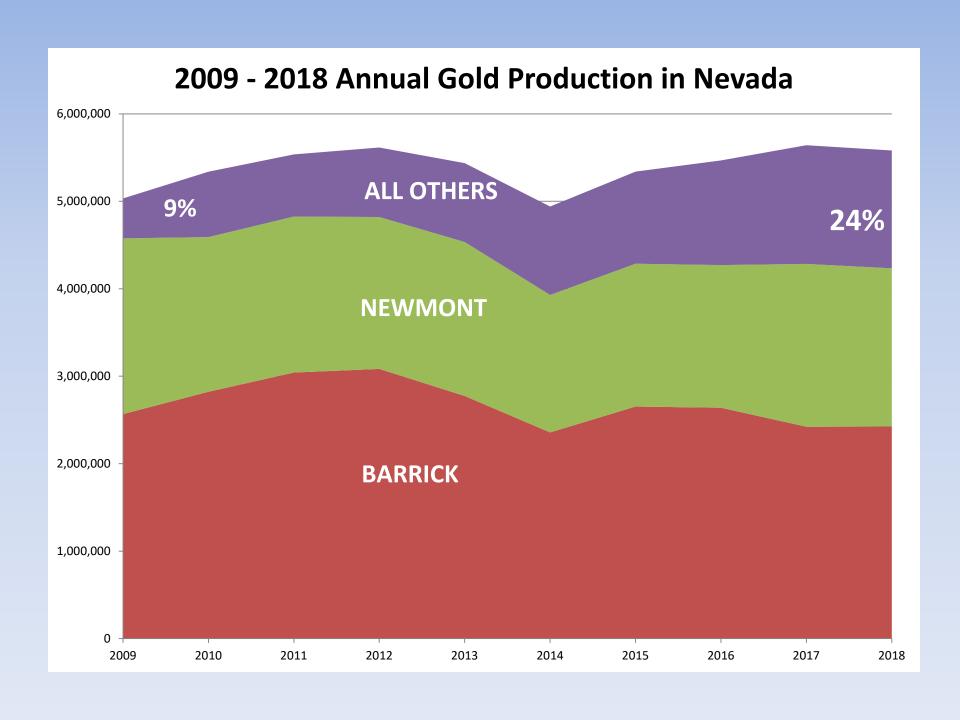






2018 NEVADA METAL PRODUCTION

2018 NEVADA METAL PRODUCTION, BY PRODUCER - Final Ranked by gold production				
Operator Production	Gold (ozs)	Silver (ozs)	Copper (lbs)	Moly (lbs)
Barrick	2,425,512	105,360		
Newmont	1,808,484	1,107,493	32,102,979	
Kinross	660,100	820,042		
SSR Mining	205,161	4,315		
Jerritt Canyon Gold	145,064	NR		
Hecla (Klondex)	109,614	516,312		
Coeur	54,668	5,037,983		
Florida Canyon Mining (Alio Gold)	46,878	31,775		
KGHM International	38,990	171,679	112,552,787	459,959
Fiore Gold	37,403	NR		
Premier Gold (40% of S. Arturo)	20,980	NR		
Rawhide Mining	15,444	208,875		
Mineral Ridge Gold	7,497	3,444		
Ruby Hill Mining	4,648	3,584		
Borealis Mining	420	394		
Sunrise Minerals	268	150		
Geo-Nevada	14	NR		
New Gold Nevada	14	2		
Totals	5,581,160	8,011,408	144,655,766	459,959

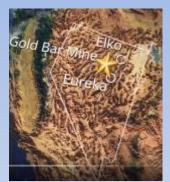


New Operation for 2019, #1: McEwen Mining – Gold Bar





- First gold pour February 2019
- > Full Production achieved May, 2019
- Production target 60,000 Au oz/yr
- > Avg. Au grade 1.0 g/t
- **➤** Current mine life 7 years



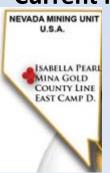


New Operation for 2019, #2: Gold Resource Corp. – Isabella Pearl

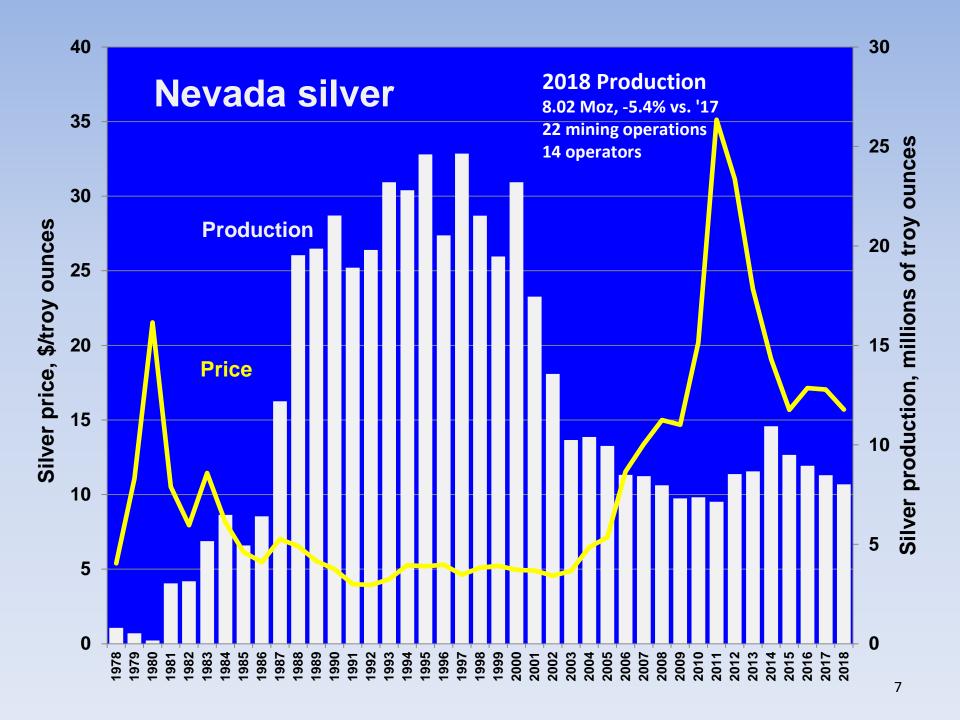


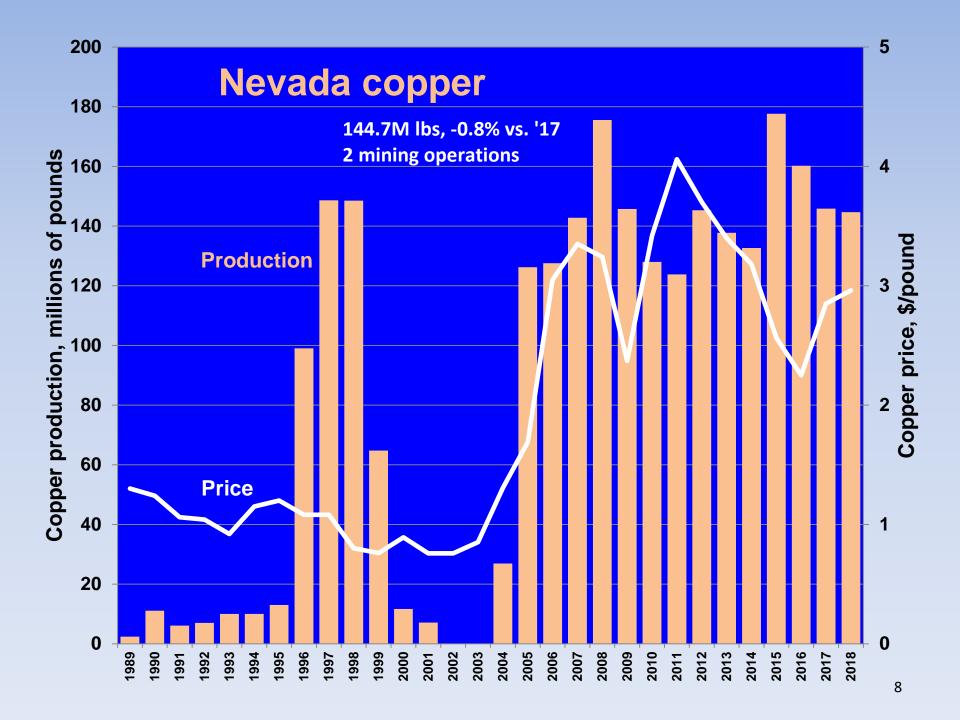


- **→** Groundbreaking June 2018
- > First gold pour April 2019
- ➤ Production target 40,000 Au oz/yr
- > Avg. Au grade 3.7 g/t
- **➤** Current mine life 5 years









NEVADA COPPER – PUMPKIN HOLLOW MINE

- 2 deposits with 5 billion contained pounds of Cu:
 - Higher grade eastern deposit; underground
 - Shallower western deposit; open-pit
- ➤ Currently developing a 5,000 tpd underground mine on the eastern deposit with a concentrator
- ➤ Main shaft being extended to 2,147 feet
- First copper production planned for @Q4 2019
- The mine should employ ~300 people
- Nevada's 3rd copper producer in past 20 years

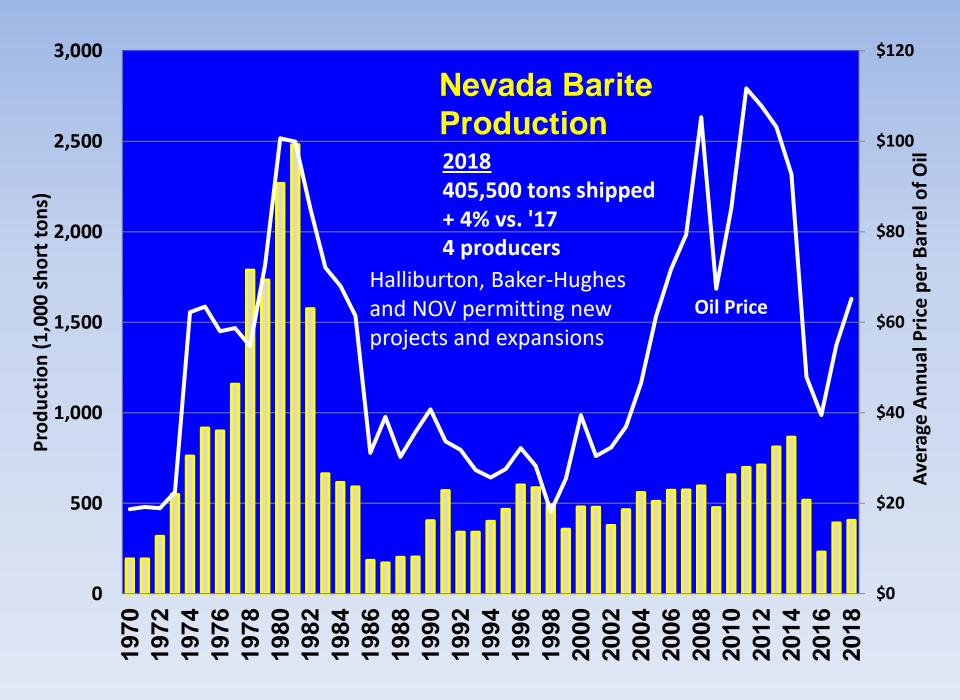


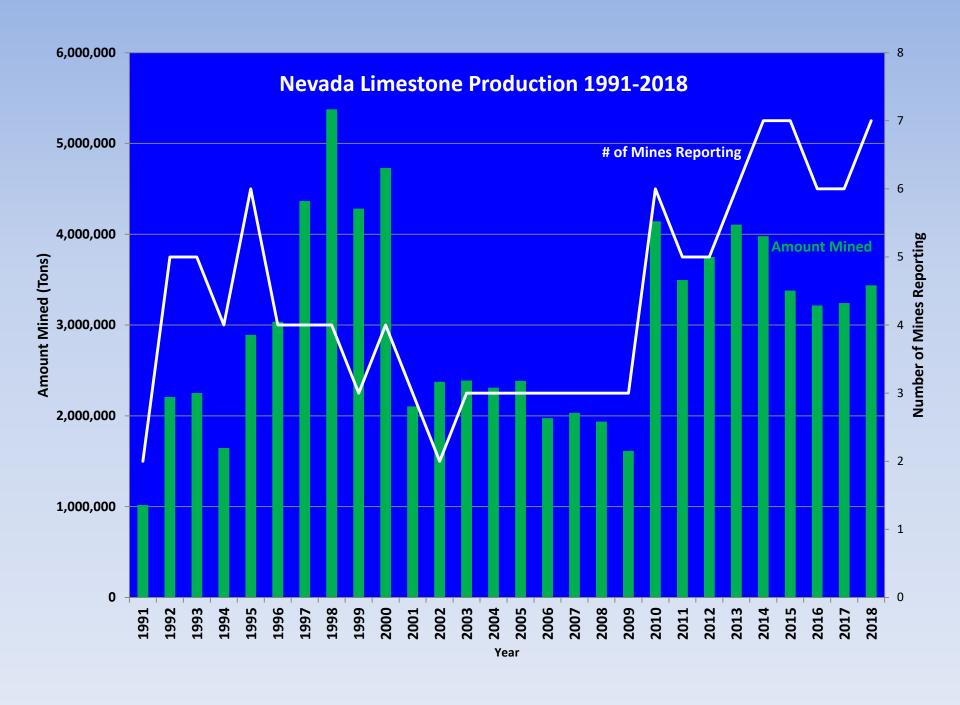


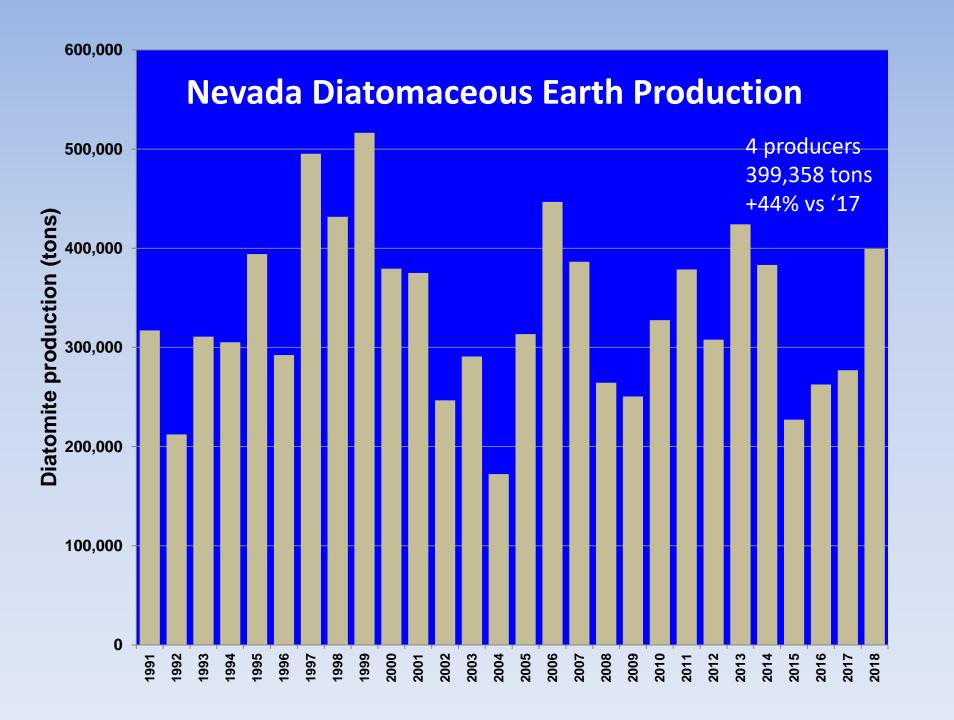
Concentrator under construction, July 2019



Headframe and stockpiles, July 2019







Other Industrial Minerals Produced in 2018

- 12,900,000 lbs of lithium carbonate
- 716,000 tons of silica sand
- 348,600 tons of magnesite
- 19,900 tons of salt
- 17,087 tons of perlite



Fluid Mineral Resources

- Geothermal well permitting and compliance NRS 534A
- Oil and gas well permitting and compliance NRS 522
- Dissolved Mineral Resource Exploration well and borehole permitting NRS 534B



Geothermal Development 2017-2018



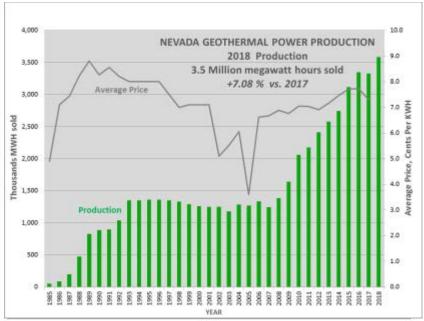
Wells Drilled 2017-2018

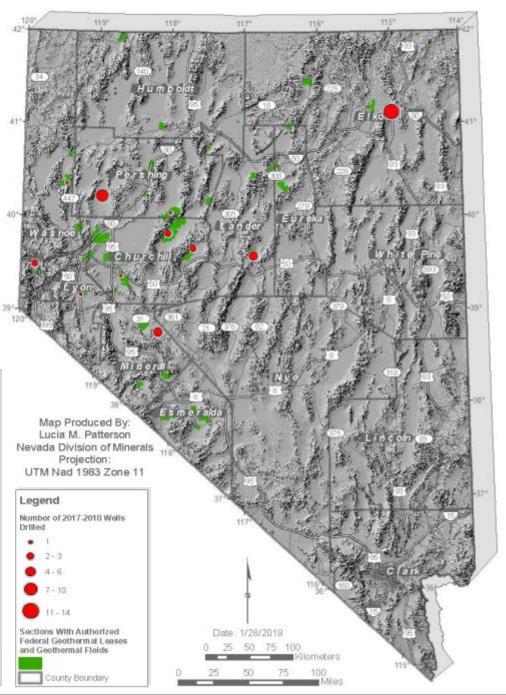
- 3 Domestic
- 4 Industrial Injection
- 8 Industrial Production
- 3 Observation
- 31 Temperature Gradient

As of 12/31/2018 there were 459 permitted commercial and industrial wells

There are 25 active geothermal plants in Nevada

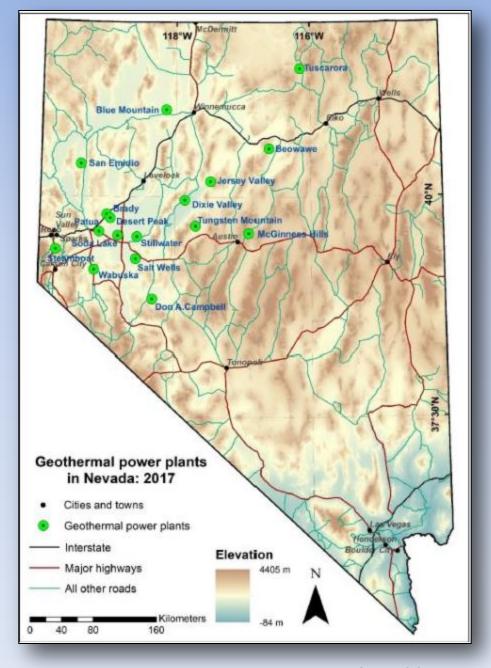
There are 727 authorized geothermal leases as of 01/07/2019 which total 334,303 acres





Geothermal Operators

- There are currently 17 geothermal fields in Nevada being operated by 5 operators:
 - Ormat Nevada: Steamboat, McGinness Hills, Brady, Desert Peak, Wild Rose (Don Campbell), Jersey Valley, Tuscarora, and Tungsten Mountain, San Emidio
 - Terra-Gen: Dixie Valley and Beowawe
 - Cyrq Energy: Soda Lake, Patua, Blue Mtn
 - Enel North America: Stillwater and Salt Wells
 - Star Peak Geothermal: Wabuska
- > 458 permitted wells
- **→** 60% on private property
- > >334,000 acres in authorized BLM leases



From: NBMG MI-2017

New Geothermal Plant in 2018: Ormat Technologies McGinness Hills Phase III

General

- Phase III plant went on-line in December, 2018
- 48 MW capacity
- 5 Production wells, 1 injection well drilled 2017-2018



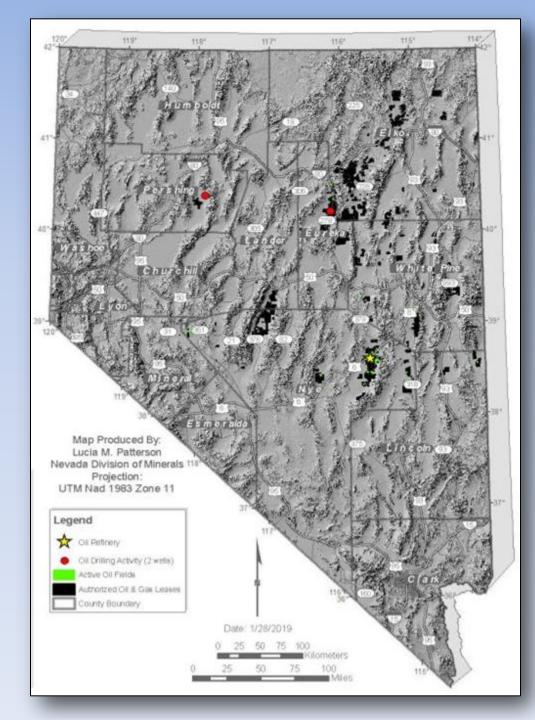


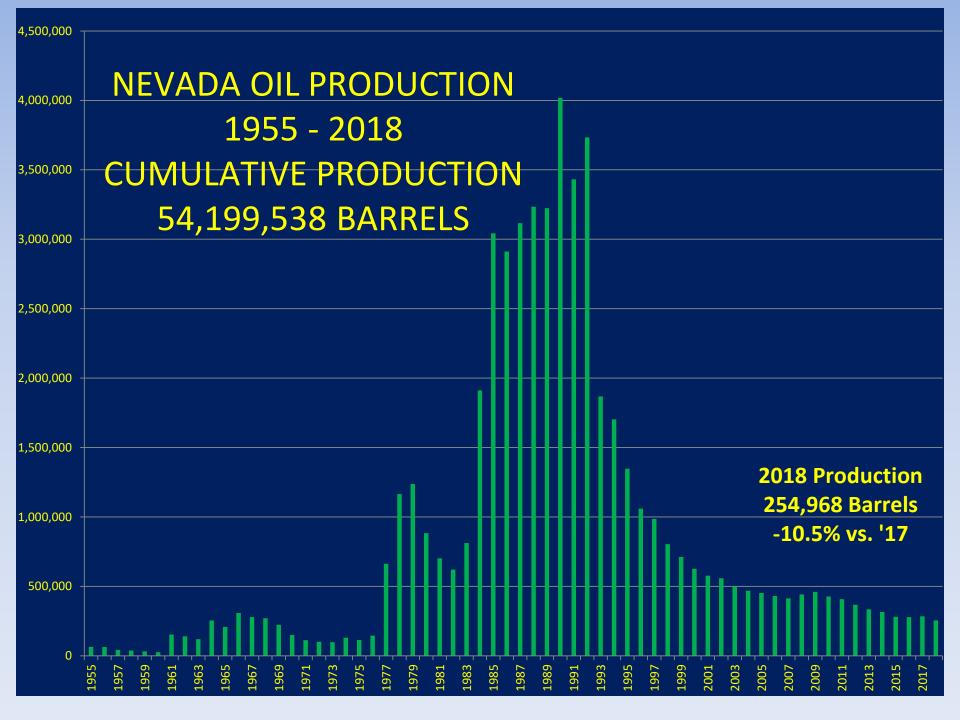
- Phase I at 30 MW (2012)
- Phase 2 increase to 72 MW (2015)
- Phase 3 increase to 138 MW (2018)

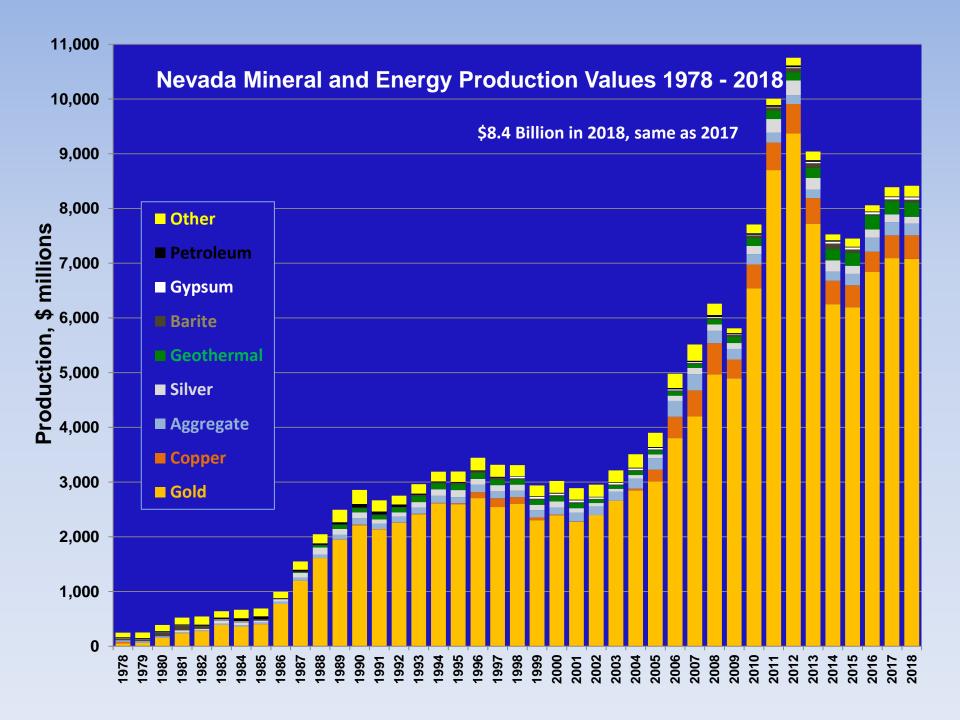
2018 Nevada Oil Activity

- > 5 oil producers:
 - Makoil
 - Grant Canyon
 - Kirkwood
 - Western General
 - Tomera Ranch
- ➤ 60 producing wells in 10 fields
- ➤ 119 permitted oil wells
- > 99% on Federal land
- ➤ 194 authorized oil leases totaling 337,000 acres
- ➤ 3 new drilling permits issued in 2018

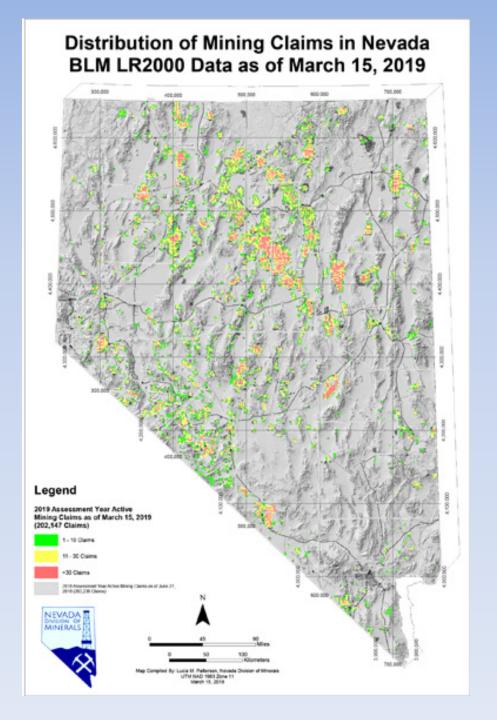








202,147 Active Mining Claims in Nevada as of 3/15/2019, an increase of 0.4% from 2/22/2018



Dissolved Minerals Development 2017-2018

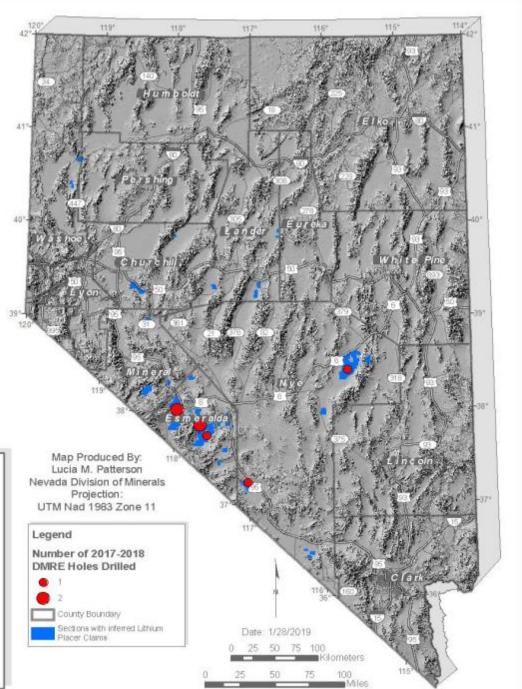


As of 01/22/2019 there were 7 DMRE holes drilled

- 5 Wells
- 2 Boreholes

As of 01/04/2019 there were 11,772 inferred lithium placer claims





DMRE WELL DRILLED UNDER NEW REGULATIONS IN RAILROAD VALLEY, NYE COUNTY. 3PL Operating, David Gibson Drilling

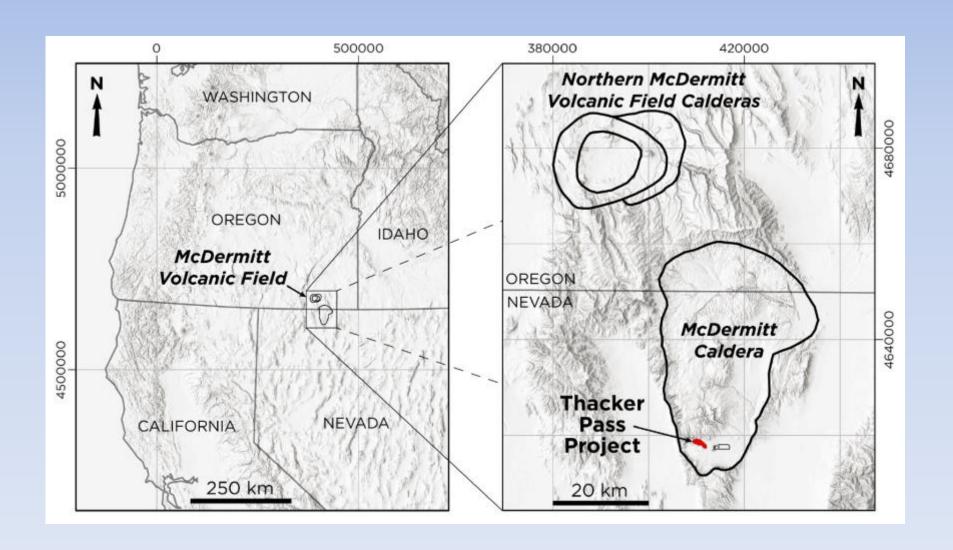


Photo taken May 13, 2018

Lithium Clay Projects

- > Exploration regulations same as hard rock
 - Notice or plan-level under BLM
 - No permitting of boreholes needed as no water pumped
- Mine permitting same as any mining project
 - On Federal lands, BLM or USFS lead agency
 - On Private lands, NDEP-BMRR is lead agency
- Two projects which have done PFS reports, metallurgical studies, and proposed flowsheets:
 - Lithium Americas Thacker Pass Project in Humboldt County
 - Ioneer Ltd. Rhyolite Ridge Project in Esmeralda County

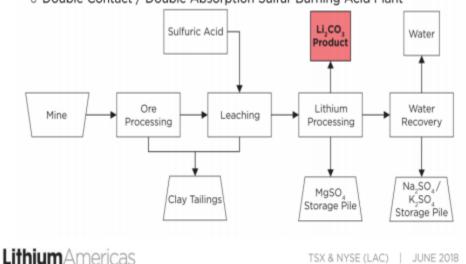
Lithium Americas - Thacker Pass Project



Lithium Americas – Thacker Pass Project

PLANT

- Process is comprised of 3 functional areas: Ore Preparation & Leaching, Sulfuric Acid Plant, & Lithium Processing Plant
- No new process technology, only traditional chemical processing equipment used in unique ways, specific to the LNC extraction process:
 - Tanks (stirred reactors)
 - o Vacuum Belt Filters
 - Single and Double-Effect Crystallizers
 - o Double Contact / Double Absorption Sulfur-Burning Acid Plant



- Reserves 3.1M tonnes LCE at 2,358 ppm Li
- ➤ Strip ratio 1.6:1
- ➤ Mine life 46 years
- Processing time <24 hours</p>
- ➤ Lithium recovery 83%
- Pilot plant operational in Reno
- Final Mine PoO to be submitted to BLM later this year

Ioneer's Rhyolite Ridge Project





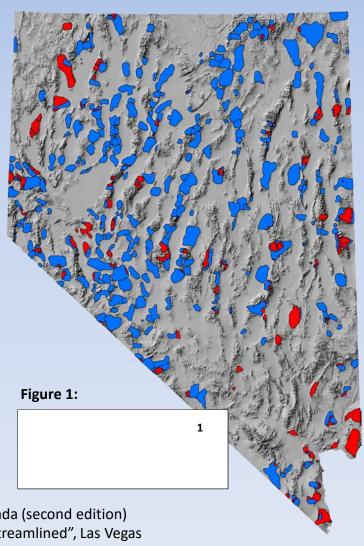
A searlesite resource that is different to other sedimentary lithium deposits - it is suitable for a simple acid leach process



- Total Resource¹ of 4.1 million tonnes lithium carbonate & 10.9 million tonnes boric acid
- Including 121 million tonnes of lithium-boron ore containing:
 - 1.1 million tonnes lithium carbonate
 - 8.6 million tonnes boric acid
- Lithium only clay mineralisation to be stockpiled

Critical Minerals Affected by Mineral Entry Withdrawals

- ➤ 35 minerals identified as "Critical Minerals" by the U.S. Department of the Interior in May, 2018.
- Minerals selected are deemed "vital to the Nation's security and economic prosperity."
- Nevada contains known occurrences or deposits of 20 of the 35 critical minerals²
- More than 330 historic mining districts contain occurrences of one or more critical minerals¹



¹Tingley, Joseph V. (1998). NBMG Report 47, Mining districts of Nevada (second edition)

² Martin, Gary. "Mining of 20 'critical' minerals in Nevada could be streamlined", Las Vegas Review-Journal, 21 May, 2018. Accessed 9 August, 2019.

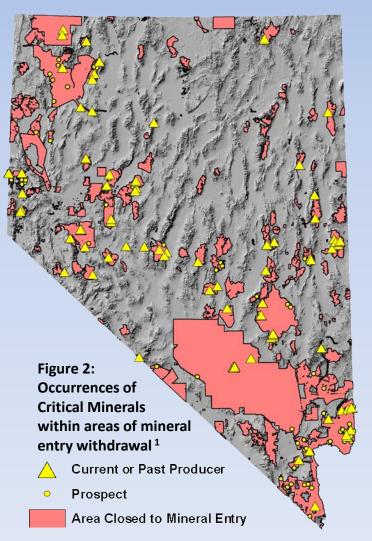
Critical Minerals Affected by Mineral Entry Withdrawals

- ➤ Aluminum
 ➤ Antimony*
 ➤ Arsenic*
- **►** Barite*
- > Beryllium*
- **S** Bismuth
- Cesium & Rubidium
- > Chromium
- **Cobalt**
- > Fluorspar*
- **Gallium**
- **Sermanium**
- Graphite
- > Helium
- > Indium
- Lithium*
- Magnesium*

- → Manganese*
- Niobium 🕒
- > PGM
- > Potash
- > REE
- > Rhenium
- Scandium
- **Strontium**
- Tantalum
- > Tellurium
- > Tin
- **Titanium**
- Tungsten*
- Uranium*
- > Vanadium
- Zirconium & Hafnium

Bold indicates know occurrences

* indicates past or present production



¹ USGS Mineral Resources Data System, (2016). https://mrdata.usgs.gov/mrds/

The Study

Opportunities for Precious Metals Toll Milling and Copper Concentrate Processing in Nevada

Nevada Bureau of Mines and Geology - Report 57

Funded by The Nevada Commission on Mineral Resources

Authored by

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David A. Davis

Lucia M. Patterson

Joel C. Lenz

Nevada Governor's Office of

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Ore Tolling Study Questions

• Is there a need for a custom milling facility in Nevada for the processing of precious metals ores, or are there existing facilities that have the capacity to process toll ores?

• Would it be beneficial to construct a facility for processing copper concentrates in Nevada?

Methodology

- Inventory of Processing Facilities
- Types of Ore Eligible for Toll Milling
- Availability of Ore Resources
- Inventory of Custom Processing Facilities in Nevada
- Reviewed the Commercial Copper Concentrate Processes
- Smelter/Concentrate Leach Fatal Flaw Analysis

Dump Leach

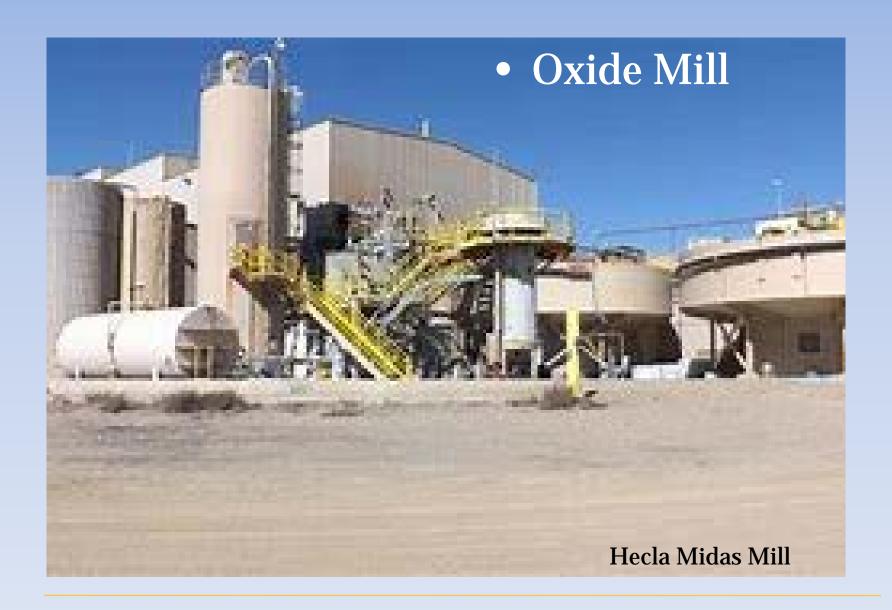


Coeur Rochester

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Heap and Dump Leaches in Nevada

Facility Name	Owner/Operator	Mine	Capacity, tpd	Operating	County
Bald Mtn. No. Mooney	KG Mining, Inc.	Bald Mtn.	Combined	Yes	White Pine
Bald Mtn. So. Mooney	KG Mining, Inc	Bald Mtn.	55,000 to 60,000	Yes	White Pine
Bald Mtn. Plant No. 2	KG Mining, Inc.	Bald Mtn.	N/A	Partial – Residual Leach	White Pine
Borealis	Borealis Mining Co. LLC	Borealis	N/A	Partial – Residual Leach	Mineral
Carlin Heap Leach	Newmont Mining Corp.	Carlin	Varies	Yes	Eureka
Coeur Rochester	Coeur Rochester, Inc.	Rochester	53,600	Yes	Pershing
Comstock	Comstock Mining, Inc.	Lucerne Pit	1,780	No	Storey
Cortez Area 28, 30, 34	Barrick Cortez, Inc.	Cortez, Pipeline	46,000 to 64,000	Yes	Lander
Denton-Rawhide	Rawhide Mining, LLC	Denton-Rawhide	14,000	Partial – Residual Leach	Mineral
Emigrant	Newmont Mining Corp.	Emigrant	Varies	Yes	Eureka
Florida Canyon	Alio Gold	Florida Canyon	24,000	Yes	Pershing
Gold Bar	McEwen Mining Inc.	Gold Bar	8,050	No – In Construction	Eureka
Hycroft	Hycroft Mining Corp.	Hycroft Mine	N/A	Partial – Residual Leach	Humboldt
Lone Tree	Newmont Mining Corp.	Lone Tree	Varies	Yes	Humboldt
Long Canyon	Newmont Mining Corp.	Long Canyon	Varies	Yes	Elko
Marigold	Silver Standard Res. Inc.	Marigold	64,700	Yes	Humboldt
Mineral Ridge	Mineral Ridge Gold LLC	Mineral Ridge	4,000	Partial – Residual Leach	Esmeralda
Pan	GRP Pan, LLC	Pan	13,000 to 14,400	Yes	White Pine
Phoenix	Newmont Mining Corp.	Phoenix	N/A	No	Lander
Relief Canyon	Pershing Gold Corp.	Relief Canyon	16,700	No - Proposed	Pershing
Round Mountain	Round Mtn. Gold Corp.	Round Mountain	55,000	Yes	Nye
Ruby Hill	Ruby Hill Mining Corp	Ruby Hill	7,000	Partial – Residual Leach	Eureka
Twin Creeks	Newmont Mining Corp.	Twin Creeks	5,500	Yes	Humboldt
Vantage	KG Mining, Inc.	Vantage Basin	N/A	No – In Construction	White Pine

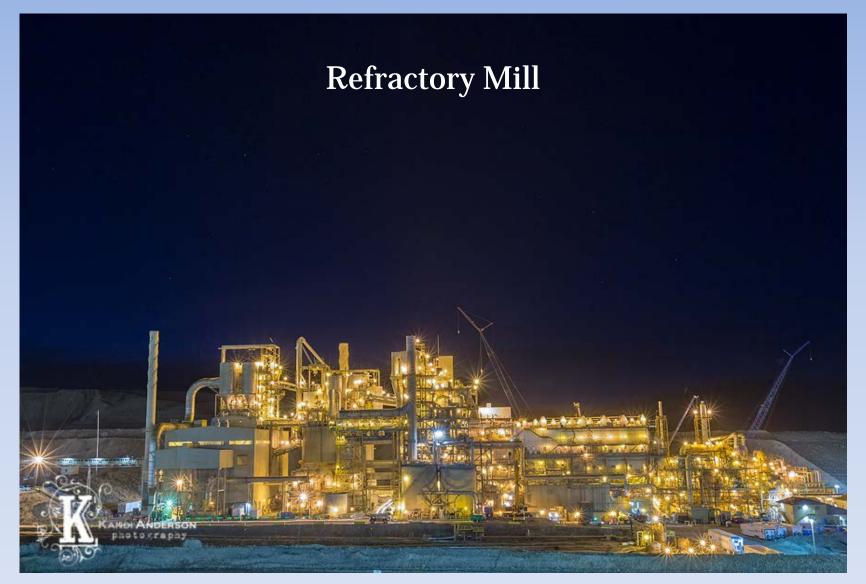


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Oxide Mills

Facility Name	Owner/Operator	Mine	Capacity, tpd	Operating	County
Aurora Mill	Klondex Mines, Ltd.	Aurora	350	Yes - Partial	Mineral
Carlin Mill 5	Newmont Mining Corp.	Carlin	13,000 – 17,000	Yes	Eureka
Cortez Pipeline Mill	Barrick Cortez, Inc.	Cortez Hills, Pipeline	14,000	Yes	Lander
Crown Point Mill	Crown Point Holdings	None	125	No	Storey
Gold Bar Mill	Fremont Gold Ltd	Gold Bar	3,500	No	Eureka
Goldwedge Mill	Mineral Ridge, LLC	Goldwedge	450	No	Nye
Midas Mill	Klondex Mines, Ltd.	Midas; Fire Creek; Hollister	1,200	Yes	Elko
Mineral Ridge Mill	Mineral Ridge, LLC	Mineral Ridge	4,000	No - Proposed	Esmeralda
Phoenix Mill	Newmont Mining Corp.	Phoenix			
Round Mountain Mill	Round Mtn. Gold Corp.	Round Mountain	10,000	Yes	Nye
Ruby Hill Mill	Ruby Hill Mining Co. LLC	Ruby Hill	3,500	No	Eureka
Taylor Mill	Silver Predator Corp.	Taylor	1,320	No	White Pine
Twin Creeks Juniper	Newmont Mining Corp.	Twin Creeks	3,000	Yes	Humboldt
Twin Creeks Pinion	Newmont Mining Corp.	Twin Creeks	N/A	No	Humboldt



Newmont Mill 6

Refractory Mills

Facility Name	Owner/Operator	Mine Capacity, tpd		Operating	County
Carlin Mill 6 Roaster	Newmont Mining Corp.	Carlin	9,000 – 10,500	Yes	Eureka
Goldstrike Autoclave	Barrick Goldstrike Mines, Inc.	Barrick Goldstrike	17,000	Yes	Eureka
Goldstrike Roaster	Barrick Goldstrike Mines, Inc.	Barrick Goldstrike	17,500	Yes	Eureka
Jerritt Canyon Roaster	Jerritt Canyon Gold, LLC	Jerritt Canyon	4,000 – 4,500	Yes	Elko
Lone Tree Autoclave	Newmont Mining Corp	Lone Tree	2,500	No	Humboldt
Twin Creeks Sage	Newmont Mining Corp.	Twin Creeks	10,700	Yes	Humboldt

Flotation Concentrator



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Flotation Concentrators

Facility Name	Owner/Operator	Mine Capacity, tp		Operating	County
Carlin Mill 5	Newmont Mining Corp.	Carlin	13,000 – 17,000	Yes	Eureka
Lone Tree	Newmont Mining Corp.	Lone Tree	6,000	No	Humboldt
Phoenix Copper Leach	Newmont Mining Corp.	Phoenix	Varies	Yes	Lander
Phoenix Concentrator	Newmont Mining Corp.	Phoenix	33,000 – 38,000	Yes	Lander
Robinson Concentrator	KGHM International, Ltd.	Robinson – Ruth Pit	46,000	Yes	White Pine
Taylor Mill	Silver Predator Corp.	Ward	1,320	No	White Pine

What is Toll Milling and Why Would You Do It?

- The Deposit is Small
- Limited Access to Land, Power, or Water
- Access to Capital
- Permitting Difficulties
- Other?

Heap Leach Orebodies- Screening

- Are Heap Leach Orebodies a Good Fit?
- Not Really!
 - Valuable pad space
 - Difficulty segregating ore/solutions
 - Long leach cycles
 - Metallurgical balance challenges
 - Lower grades can't support transport costs

Ore Resources - Screening

- Gold Resources above 0.100 opt
- List of Copper Resources

Selected Nevada Gold Resources

Table 7. Contained Gold in Selected Precious Metal Resources in Nevada

					Contained	
Deposit Name	Year	Tons	Au, opt	Classification	Oz Au	
Fondaway Canyon	2017	2,260,000	0.18	Measured & Indicated	406,800	
Fondaway Canyon	2017	3,530,000	0.19	Infe rre d	670,700	
Pyramid	2003	4,000	0.516	Infe rre d	2,064	
Buckskin	1978	561,500	0.18	Unclassified	101,070	
Big Springs - North Sammy	2014	1,607,000	0.13	Unclassified	208,910	
Kinsley Mtn Secret Canyon	2015	1,619,000	0.17	Measured & Indicated	275,230	
Tip Top	2009	388,920	0.096	Measured & Indicated	37,336	
Gold Wedge	2005	330,000	0.31	Measured & Indicated	102,300	
Tonopah (Midway)	2011	114,000	0.3017	Infe rre d	34,394	
Subtotal		10,414,420	0.177		1,838,804	
Winnemucca Mountain	1998	N/A		Indicated	300,000	
Victorine	2000	N/A		Proven & Probable	120,000	
Victorine	2000	N/A		Possible	200,000	
Grand Total Contained Au 2,458,8						

Sulfide Copper Resources

Table 8. Sulfide Copper Resources in Nevada

					Contained Cu	
Deposit Name	Year	Tons (000)	% Cu	Classification	Pounds (000)	
Yerington District						
Ann Mason	2017	1,400,000	0.32	Measured & Indicated	9,809,000	
Ann Mason	2017	623,000	0.29	Inferred	3,987,200	
Blue Hill - Sulfide	2017	49,860	0.17	Inferred	169,524	
MacArthur - Sulfide	2014	1,098	0.292	Measured & Indicated	6,408	
MacArthur - Sulfide	2014	134,900	0.283	Inferred	764,074	
Pumpkin Hollow - Open Pit	2015	566,400	0.43	Measured & Indicated	4,840,000	
Pumpkin Hollow - Open Pit	2015	8,000	0.52	Inferred	83,000	
Pumpkin Hollow - U'ground	2015	54,100	1.39	Measured & Indicated	1,503,000	
Pumpkin Hollow - U'ground	2015	29,200	1.09	Infe rre d	636,000	
Yerington - Sulfide	2013	105,000	0.3	Measured & Indicated	633,000	
Yerington - Sulfide	2013	128,000	0.23	Inferred	600,000	
Subtotal Yerington District		3,099,558	0.37		23,031,206	
Other Districts						
Band C Springs - Open Pit	2007	105,902	0.068	Measured & Indicated	144,027	
Band C Springs - U'ground	2007	2,846	0.334	Measured & Indicated	19,011	
Desert Scheelite	2012	9,270	0.14	Measured & Indicated	26,000	
Desert Scheelite	2012	1,642	0.17	Inferred	5,510	
Liberty	2014	566,159	0.084	Measured & Indicated	956,400	
Liberty	2014	148,598	0.115	Inferred	341,800	
Marjuba Hill	1965	30	3.0	Unclassified	1,800	
New York Canyon - Copper Queen	1979	142,360	0.35	Unclassified	996,520	
Pine Tree	2011	240,840	0.09	Measured & Indicated	433,512	
Pine Tree	2011	196,760	0.09	Inferred	354,168	
Tonopah	1999	98,000	0.343	Measured & Indicated	672,280	
Victoria	1981	1,375	2.15	Proven and Probable	59,125	
Subtotal Other Districts		1,513,782	0.13		4,010,153	
Grand Total		4,613,340	0.293		27,041,359	

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Oxide Copper Resources

Table 9. Oxide Copper Resources in Nevada

					Contained Cu	
Deposit Name	Year	Tons (000)	% Cu	Classification	Pounds (000)	
Contact	2016	213,113	0.2	Measured & Indicated	831,494	
Contact	2016	12,982	0.2	Inferred	52,188	
Blue Hill - Oxide	2017	47,440	0.17	Inferred	179,370	
Blue Hill - Mixed	2017	24,960	0.18	Inferred	98,210	
MacArthur - Oxide	2014	159,094	0.212	Measured & Indicated	675,513	
MacArthur - Oxide	2014	243,417	0.201	Inferred	979,510	
Yerington - Oxide	2013	23,500	0.25	Measured & Indicated	118,000	
Yerington - Oxide	2013	26,000	0.23	Inferred	118,000	
New York Canyon - Longshot	2010	16,250	0.43	Measured & Indicated	139,750	
New York Canyon - Longshot	2010	2,900	0.31	Inferred	17,980	
Total Oxide Copper		769,656	0.21		3,210,015	

We canvassed the mill operators

Here is what they told us

• Six Oxide Mills

- Aurora Mill
- Midas Mill
- Crown Point Mill
- Goldwedge Mill
- Newmont Mill 5
- Juniper Mill

• Six Refractory Mills

- Newmont Mill 6
- Sage Mill
- Jerritt Canyon
- Goldstrike Roaster
- Goldstrike Autoclaves
- Lone Tree

• Three Loaded Carbon Plants

- Pan
- Borealis
- Relief Canyon

• Two Copper Flotation Concentrators

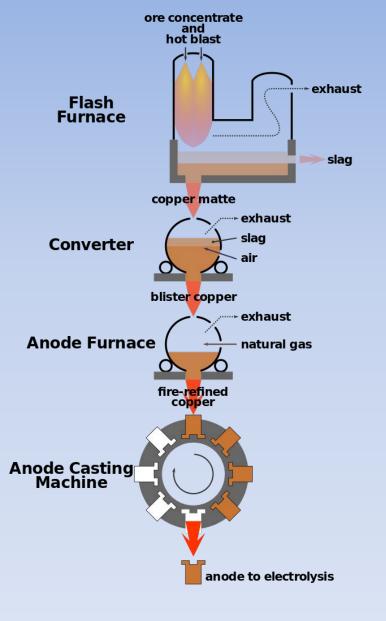
- Robinson

- Phoenix

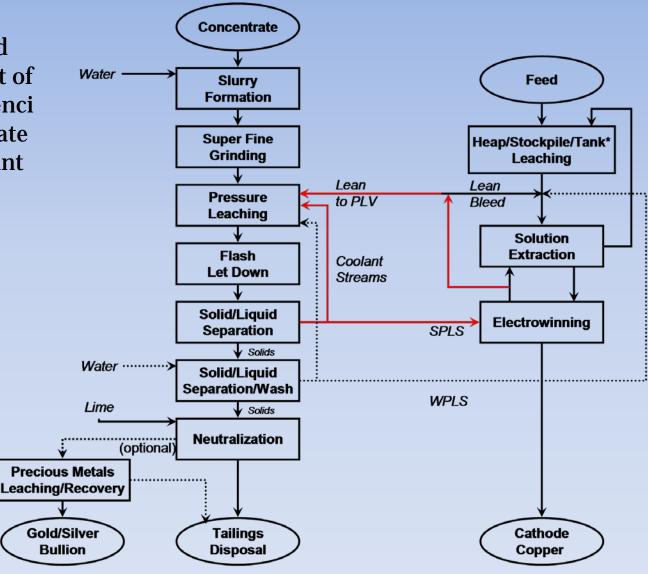
The Copper Market

- Worldwide demand is forecast to be 25 million metric tonnes
- Annual growth rate of 3% per year
- Worldwide production is about 20 million tonnes
- Global smelting 19 million metric tonnes
 - (Only 3 U.S. smelters left)
- U.S. exports 1 million tonnes of concentrate per year
 - 350,000 tonnes from Nevada and growing
 - Transportation charges \$90 \$200 per tonne

Simplified Flowsheet of a Copper Smelter



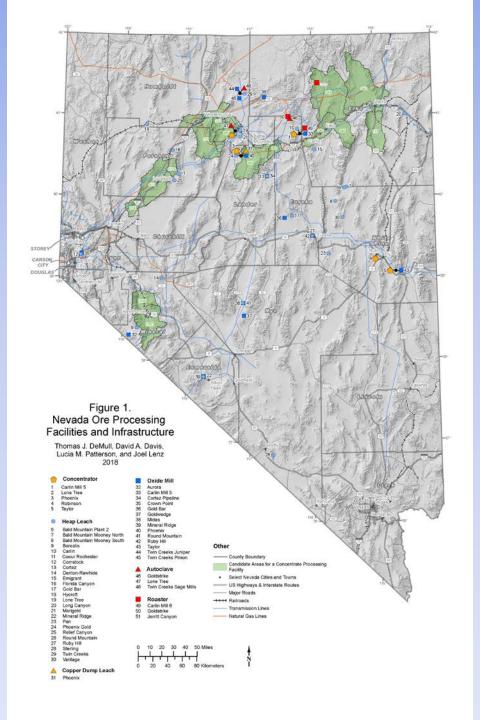
Simplified
Flowsheet of
The Morenci
Concentrate
Leach Plant





Nevada Governor's Office of

ECONOMIC DEVELOPMENT



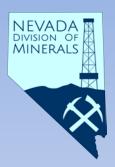
Concentrate Leach Fatal Flaw Analysis

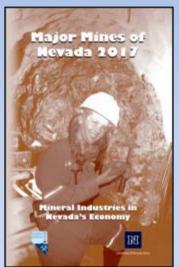
- 1. Concentrate Supply Upward Trend
- 2. Environmental Permitting Probable
- 3. Land Use Policy Positive
- 4. Accessibility and Infrastructure Attractive
- 5. Return on Investment Possible

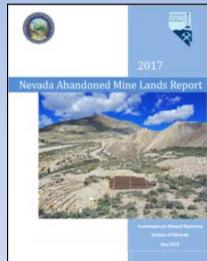
Ore Tolling Study Questions

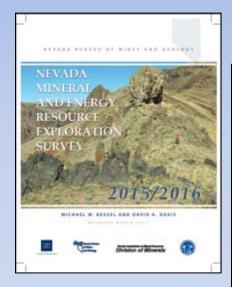
- Is there a need for a custom milling facility in Nevada for the processing of precious metals ores, or are there existing facilities that have the capacity to process toll ores? Existing facilities have capacity.
- Would it be beneficial to construct a facility for processing copper concentrates in Nevada? <u>Possibly a concentrate leach plant</u>

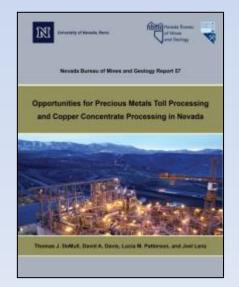
Publications

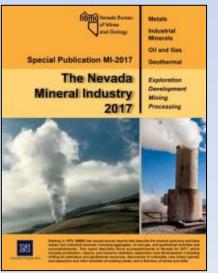














Questions?



Georgie Custom Search ADA Americans with Disabilities Act

Agencies Jobs About Nevada

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Current Information

- Dissolved Mineral Resources permitting page
- 2017 Nevada Excellence in Mine Reclamation Award
- 2015/2016 NV Mineral and Energy Resource Exploration Survey (NBMG)
- Recent Presentations
- Information Related to Proposed Land Use Plans and Withdrawals

Public Workshop(s) and Hearings(s)

- . Dissolved Mineral Resource Exploration Regulation Adoption Hearing
- Response to Summary Comments on Proposed Regulations, April 25, 2018

Employment Announcement(s)

- · None at this time.
- . How To Apply for a State Job

Education Workshop(s)

- 34th Annual Northern Nevada Earth Science Education Workshop 2018
 - July 17 and 18, 2018
 - . Tentative Location: Wooster High School, Reno, Nevada.
 - · Register at:
 - · Direct Link: (Website Registration URL Pending)
 - NvMA Link from their Mineral Education Workshops page: https://www.nevadamining.org/mineral-education-workshops/

Important Links

- · Nevada Division of Minerals Open Data Site-GIS files
- State and Federal Permits Required Before Mining or Milling Can Begin February 2015
- NDOM YouTube Channel
- NDOM Request for Public Records form
- · Nevada Bureau of Mines and Geology

Programs











