U.S. GOLD CORP

U.S. focused gold exploration and development company advancing high potential projects in Nevada and Wyoming

USAU - **NASDAQ**

December 2017

Forward Looking Statements

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U.S. Gold Corp Overview

Listed on NASDAQ as USAU June, 2017

Advancing high potential projects with the seasoned team to execute

Exploration Asset

Keystone Project - NV

- North Central NV located property next to some of the biggest mines in Nevada.
- District-scale opportunity with multiple and major gold deposit discovery characteristics.
- Located on the prolific Cortez Gold Trend, one of the world's most highly-prospective gold trends
  - 10 miles south of Barrick's Cortez Hills Mine Complex
- Keystone project identified and consolidated by Nevada exploration Geologist Dave Mathewson, previously a founder of Gold Standard Ventures who helped build the success of the Railroad project on the Carlin Gold Trend.

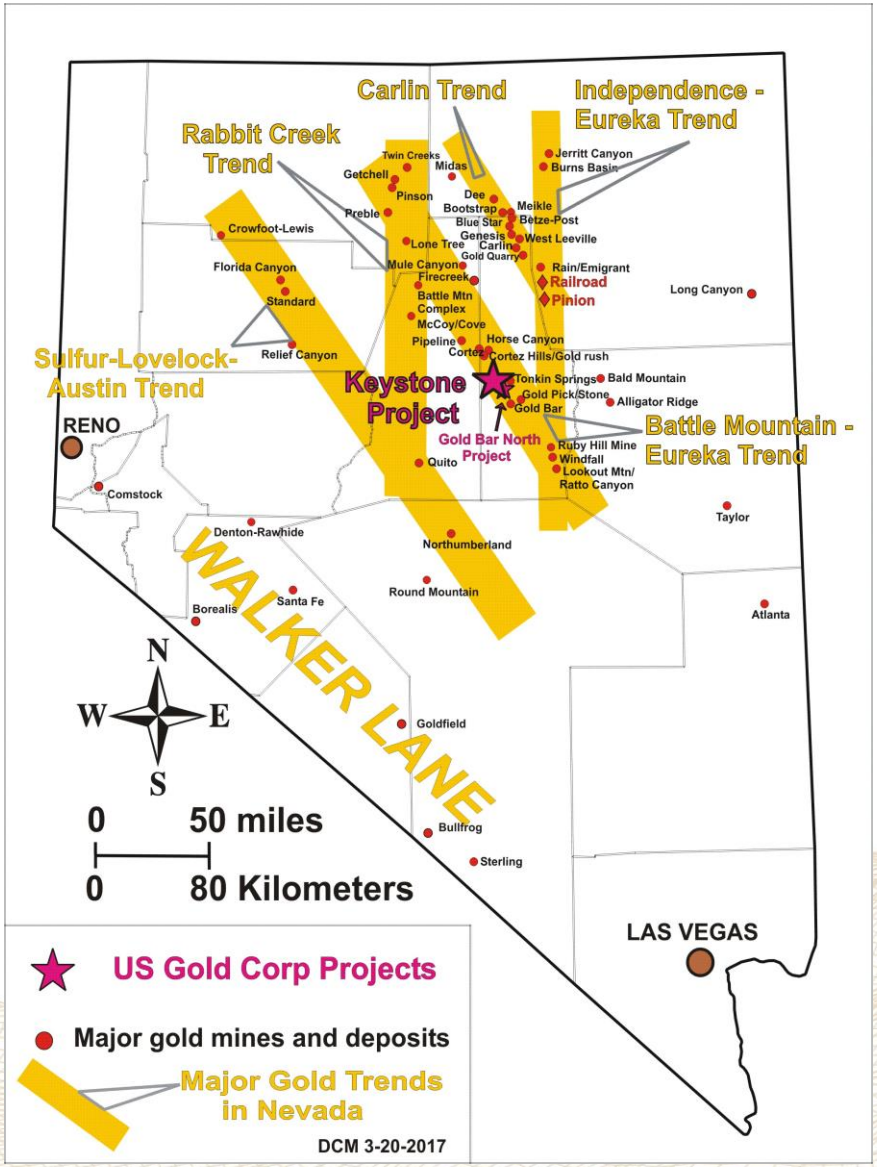
Near Term Production Potential

Copper King Project - WY

- Advanced Exploration and Development property
- Mining friendly location in the Silver Crown Mining District of southeast Wyoming.
- Historic NI 43-101 Technical Report and Preliminary Economic Assessment (**PEA**) prepared by Mine Development Associates in 2012 for Strathmore Minerals Corporation shows the following resource:
  - 1,534,000 Measured and Indicated gold equivalent ounces; approx. equal values of gold and copper.
  - Plus 345,000 Inferred gold equivalent ounces
  - $159.5 million Net Present Value (NPV) at $1,100/oz Au and $3.00/lb Cu.

Keystone Project Location/Overview

- Keystone Gold District is located in north-central “Nevada Elephant Country” within a large mining and processing infrastructure that includes several >20 million ounce gold deposits; Nevada has produced a total of more than 245 million ounces of gold
- Keystone is an under-explored complex, Late Eocene (34.1+/-0.7 Ma) intrusive-centered, domed, Devonian and Silurian, permissive carbonate lower-plate window.
- Strong, widespread gold and pathfinder soil and rock geochemistry, especially arsenic, antimony, and zinc, indicate a very large epithermal gold system is present.
- Until, implemented by US Gold Corp starting in 2016, no systematic, modern-day, model-driven, district-scale exploration has never been conducted at Keystone.
- As of late 2017 district-wide, a comprehensive gravity survey has been completed, and rock, soil, stream sediment and altered cobble surveys, and detailed geological mapping program are nearing completion.
- Several “scout” holes have been drilled in 2016 and 2017.



Brief Exploration History

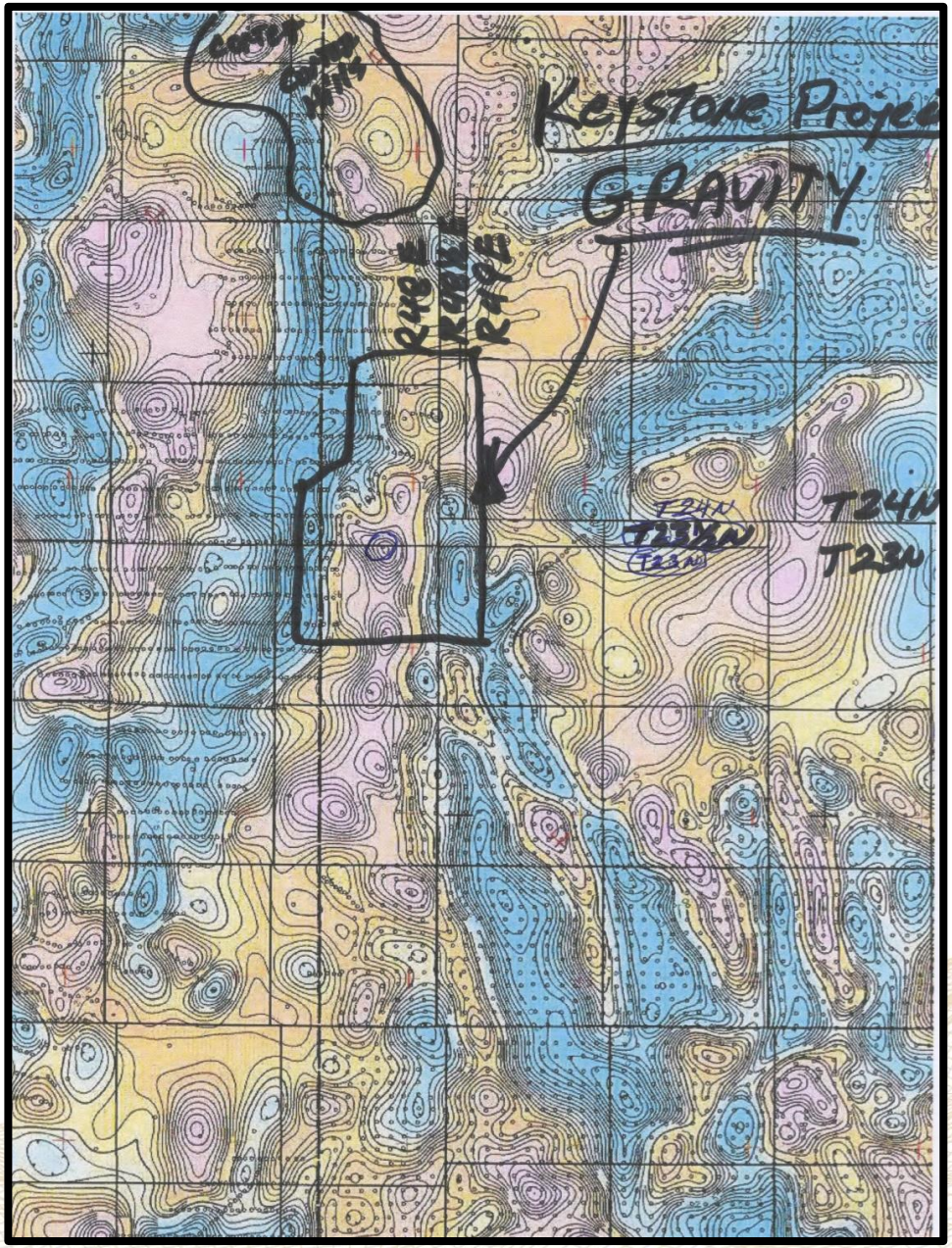
Brief History: **Newmont** drilled 6 holes in intrusive contact base metal and silver Keystone mine area in 1967, and encountered low grade (+/- 0.02 opt) gold intercepts. 1981-83 **Chevron** staked and drilled 27 shallow drill holes, followed by **USMX** that drilled an additional 19 shallow holes; significant amounts of low grade and anomalous gold were intersected. 1988-89, **Phelps Dodge** drilled 6 holes, one of which TD'd in gold mineralization, and was subsequently deepened in 1990 resulting in over 200' of low grade gold mineralization. Also, **several junior companies** drilled numerous shallow holes at various times into the extensively distributed gold-arsenic Keystone system. In 2004 with the discovery of Cortez Hills and escalating gold prices, **Nevada Pacific Gold**, **Great American Minerals** (Don McDowell), and **Tone Resources** (Dave Mathewson) competed in claim staking the entire district. McDowell and Nevada Pacific Gold leased their properties to **Placer Dome**. One year later in 2005 after taking over Placer Dome, Barrick dropped these leases. In 2006, the Tone and Nevada Pacific properties were acquired by **US Gold Corp/McEwen Mining Co**, which conducted very limited exploration. A total of about 240 holes drilled to an average depth of about 300 feet have been drilled at Keystone…mostly looking for shallow oxide mineralization and the skarn zones.

In the 1980's, Lisle gravity data planted the seed to future interest.

- Recognized gravity linear with three distinct gravity highs (carbonate horsts) coincident with aeromagnetic linears (intrusives)…the Gold Bar Trend.

- The Gold Bar deposit is located on the southernmost horst. Gold Bar is (was) a relatively high grade, i.e. 3 gm, carbonate-hosted (Denay Fm) gold deposit.

- Roughly north-south trending Paleozoic shelf margin passes just to the west of Gold Bar. The preferred place to be on a major suture is on the basinward flank, i.e. as at Keystone



Keystone Silicification

Extensive Silicification!
It's everywhere!!!

US Gold Corp. Exploration Team

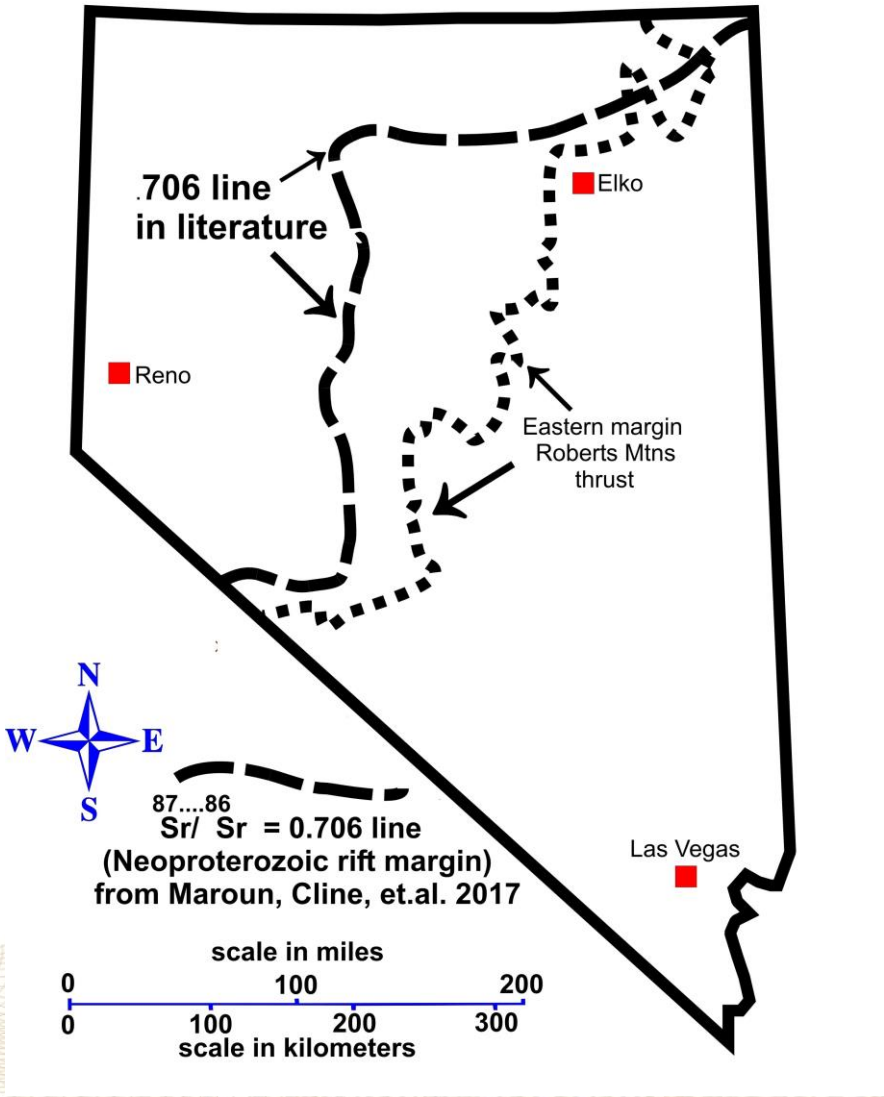
- Dave Mathewson: Vice President of Exploration
- Neil Whitmer: Operations Manager

Technical Team:

James Wright: Wright Geophysics
Joseph (Joe) Laravie: Data Management and Control Consultant
Thomas (Tom) Chapin: Keystone geological mapping and geological assessment:
Brion Theriault: Keystone prospecting/sampling
Gabriel Aliagra: UNR Masters Degree intrusives project, guided by Dr. Michael Ressell

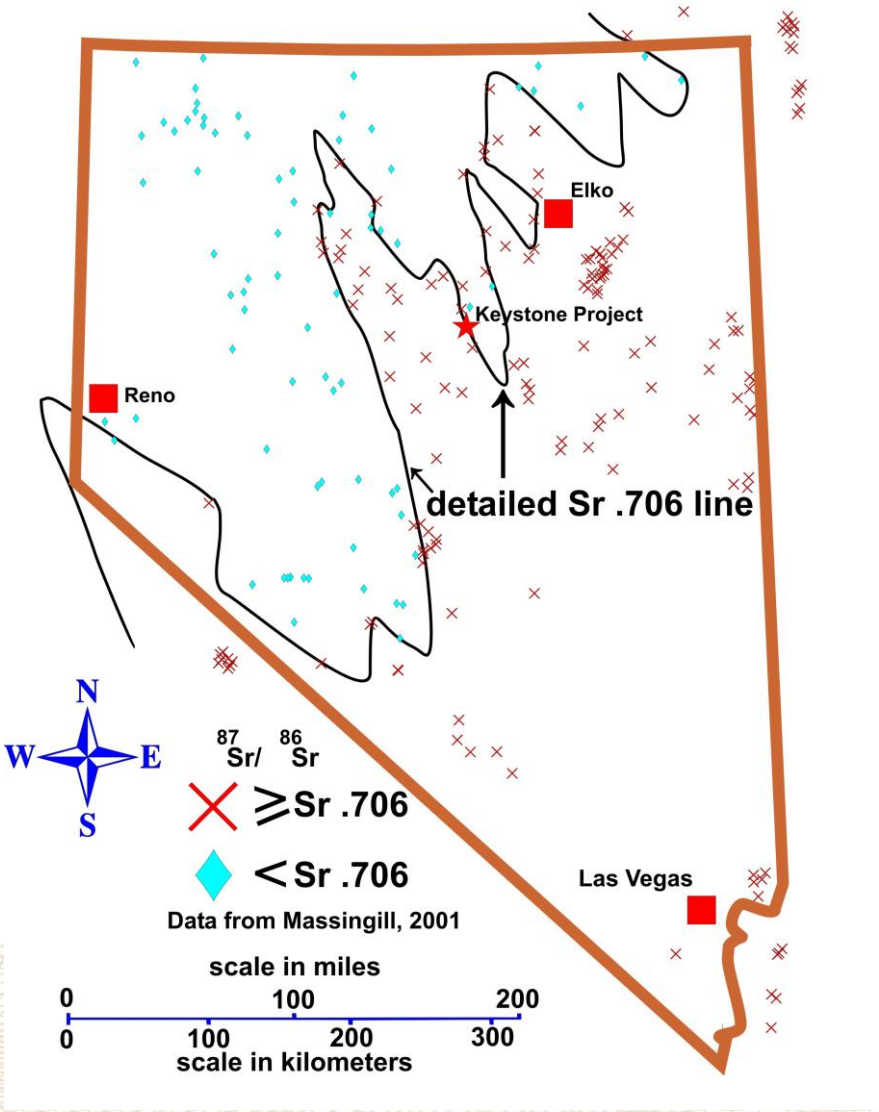
Why so much gold in Nevada?

- Why is there so much gold within the Gold trends that transect the Paleozoic continental margin? …in particular, the Battle Mtn-Eureka (Cortez) and Carlin Trends?
- The northeast-trending Sr 87/86 .706 Line “roughly” follows the Paleozoic continental margin in Nevada and through a zone of favorable geology and thin-crust where there has been repeated periods of extension with intrusive and hydrothermal activity.
- If they exist, cross-cutting breaks across the .706 line could represent deep sutures that were utilized as conduits for both magmas and the sources of gold from deep oceanic crustal or upper mantle origins.
- Current literature does not provide, with accuracy, the details of the line.
- Details can be…I believe in this situation… are very important.



The .706 line is in actuality very complex

- Gary Massingill, former Chief Geologist with Santa Fe Gold, first presented to me his assembled Sr87/Sr86 .706 data when he joined my Newmont Genex group in 1997.
- We supported his request of adding more data. Specifically, we tightened up data on “the Trends” for prospect generation purposes.
- These data were published and are available for use within the “obscure” Geological 2001 Society of Nevada Special Publication No.33.
- Note: location of right-lateral NNW “offsets”!!!

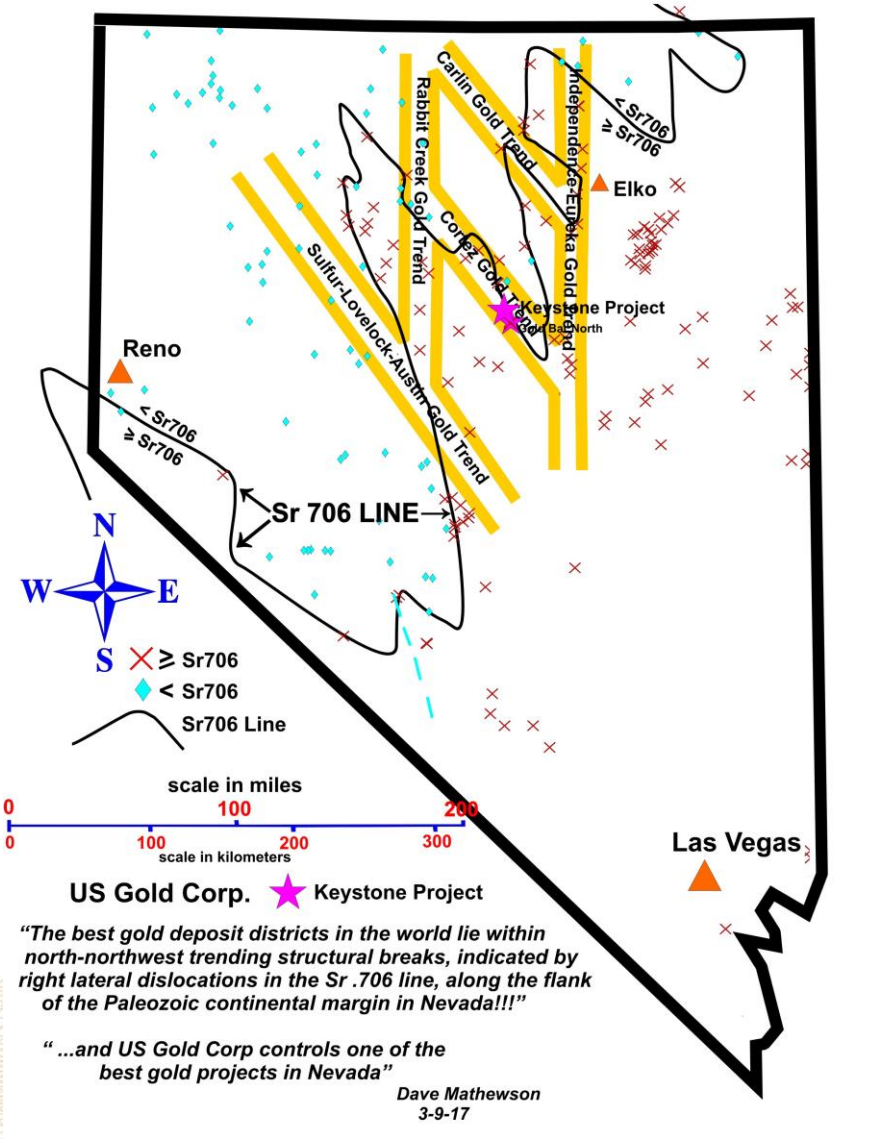


Coincidence of .706 offsets and Gold Trends in Nevada

- The right-lateral .706 line offsets quite apparently represent major structural crustal flaws that were utilized for magmatic activity and, at times, voluminous, episodic gold-bearing fluid flow.

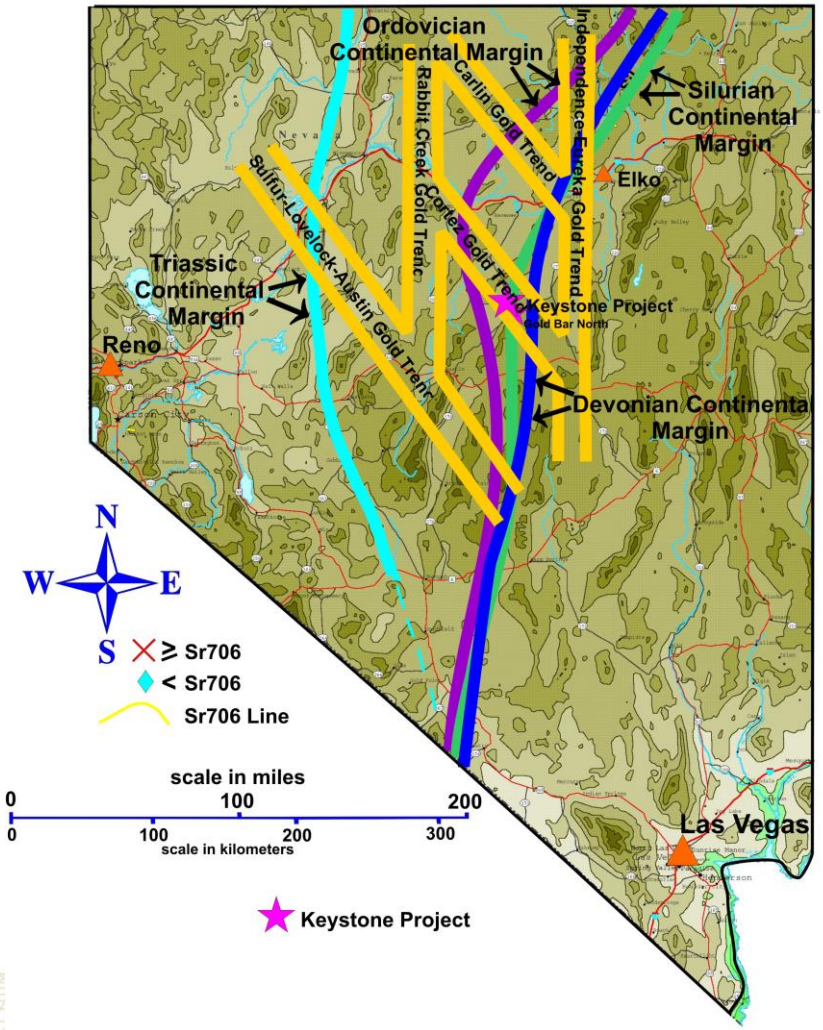
- Gold-bearing hydrothermal systems had particular enhancement in the Early Tertiary, i.e. Eocene, when large areas of North-Central Nevada were covered by lacustrine lakes.

- Both permissive rock units and contacts controlled the fluid flow distribution.



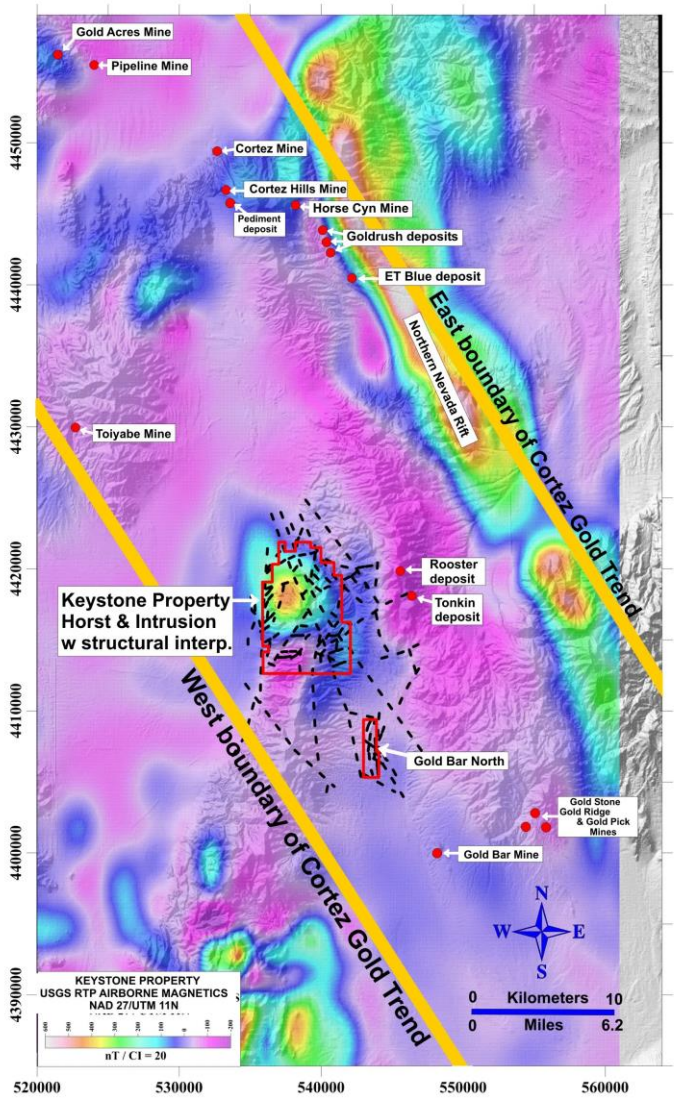
The “Perfect Storm” for major gold deposit occurrences

- The depositional margins of continents is a good location to encounter permissive, prospective carbonate rocks
- Add in the presence of contacts with locally impermeable fine-clastic rocks above the permissive carbonates and you have the “perfect storm” for development of major gold deposits.
- It really is *ALL ABOUT system structure, and host*.

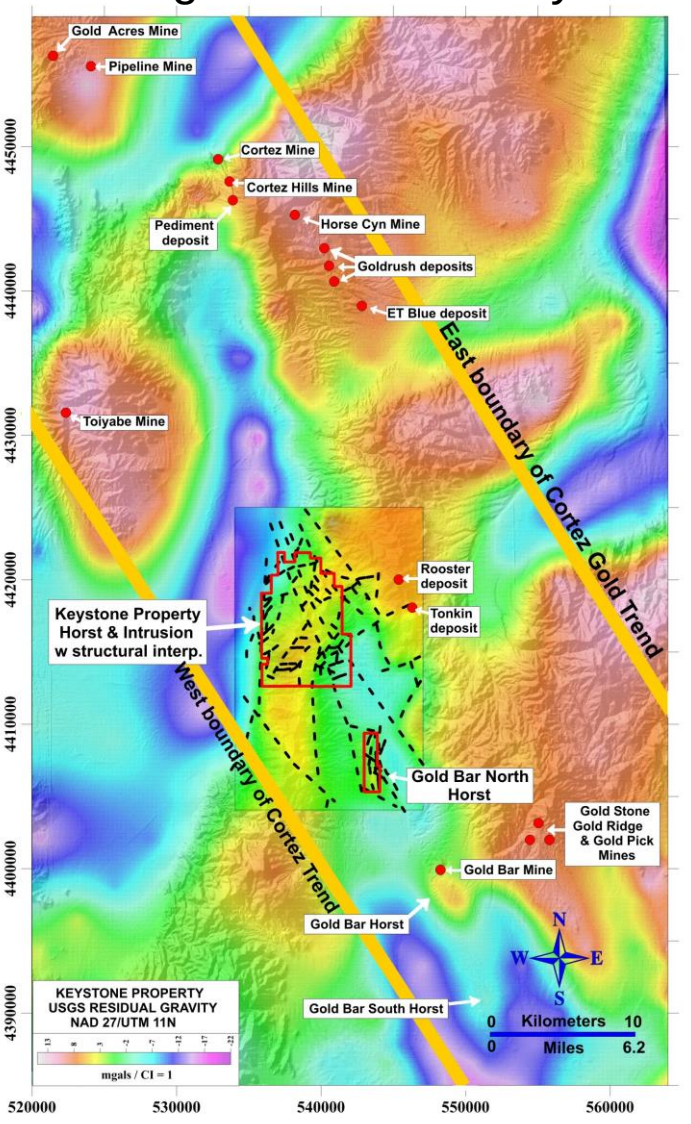


Keystone Project - Cortez Trend Location

Regional Aeromagnetics



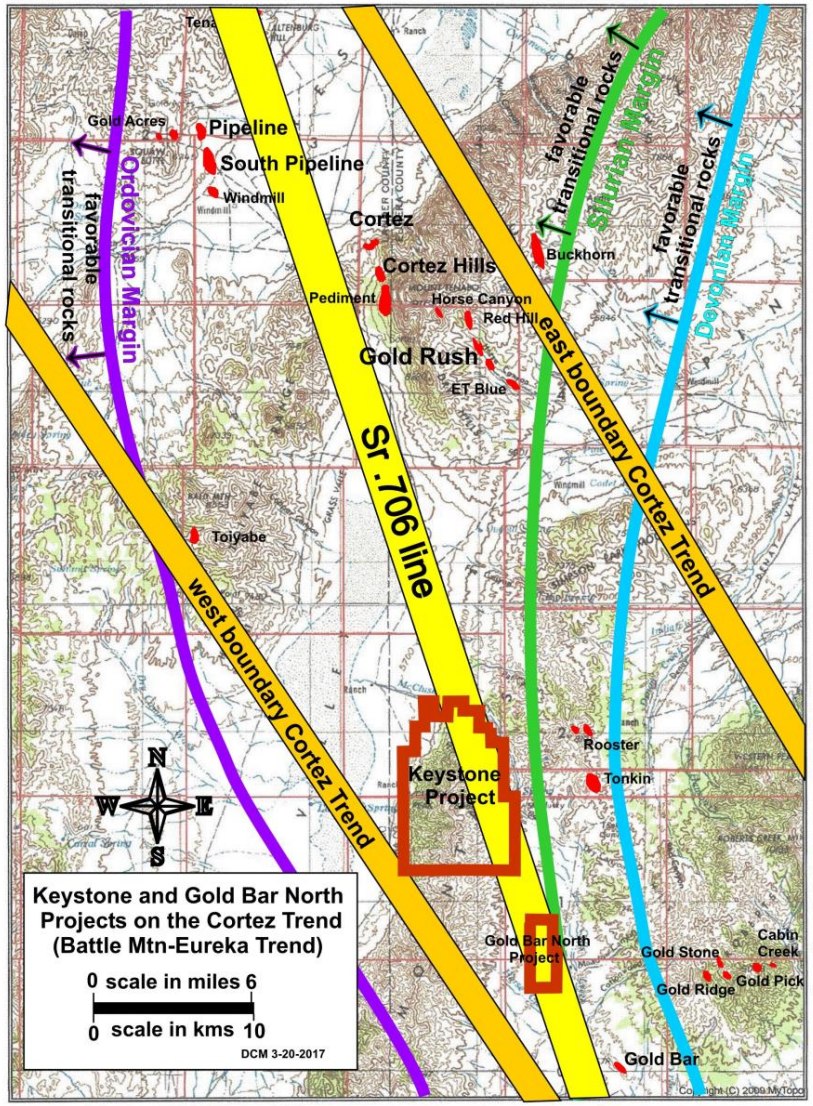
Regional CBA Gravity



.706 Line through Keystone

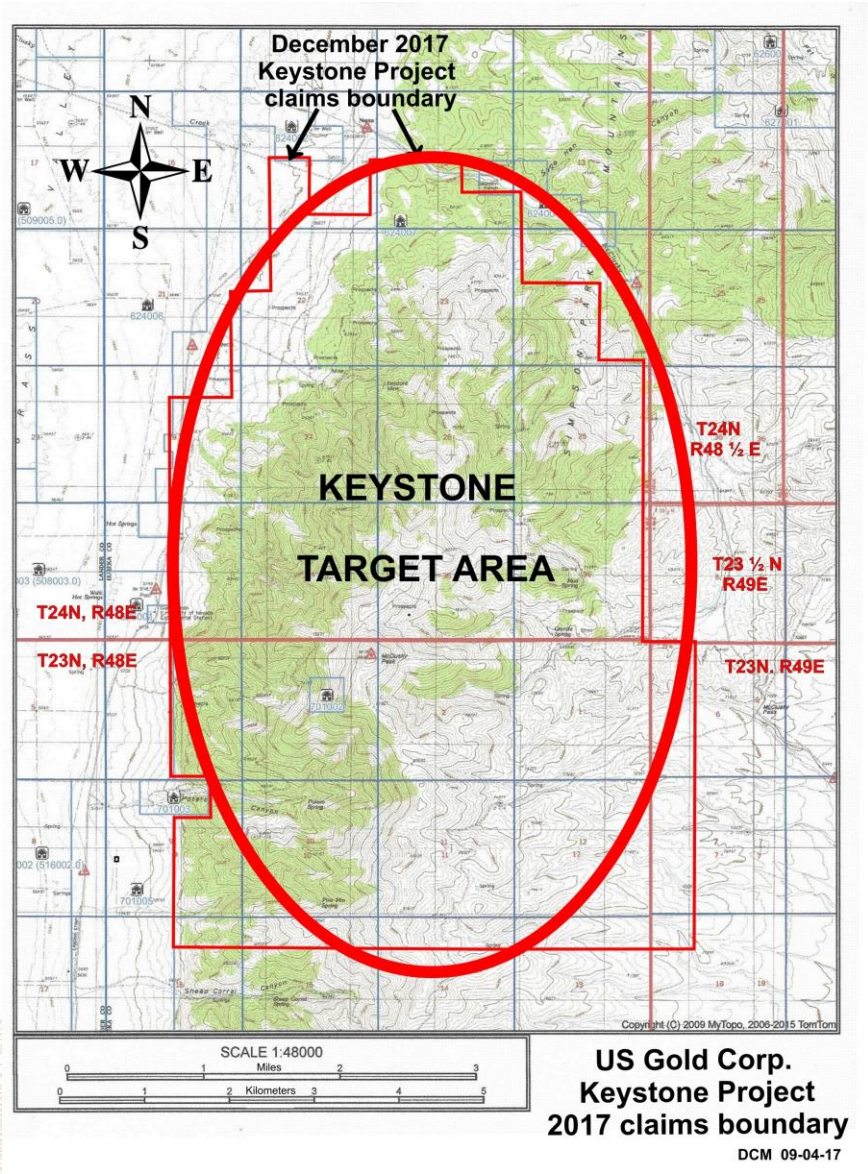
Prime Nevada Location In The Heart Of The Famed Cortez Gold Trend

- The Keystone property position controls the entire district-scale opportunity and comprises approximately 20 square miles (>12,500 acres) of mining claims
- The NNW-trending Sr .706 line likely represents a major right-lateral crustal conduit zone suture utilized for emplacement of a gold-bearing hydrothermal system and gold deposits
- The Keystone property occurs along a strong north-northwest trending gravity and magnetics linear that also includes the Gold Bar deposit to the southeast
- The host rocks at Keystone include Devonian Horse Canyon Fm and Wenban, and Roberts Mtns limestone Formations: hosts to the Pipeline, Cortez, Cortez Hills, Red Hill, and Goldrush deposits to the north
- Similar to Barrick's deposits to the north, an evident orthogonally intersecting NNW and ENE structural pattern is expressed at Keystone



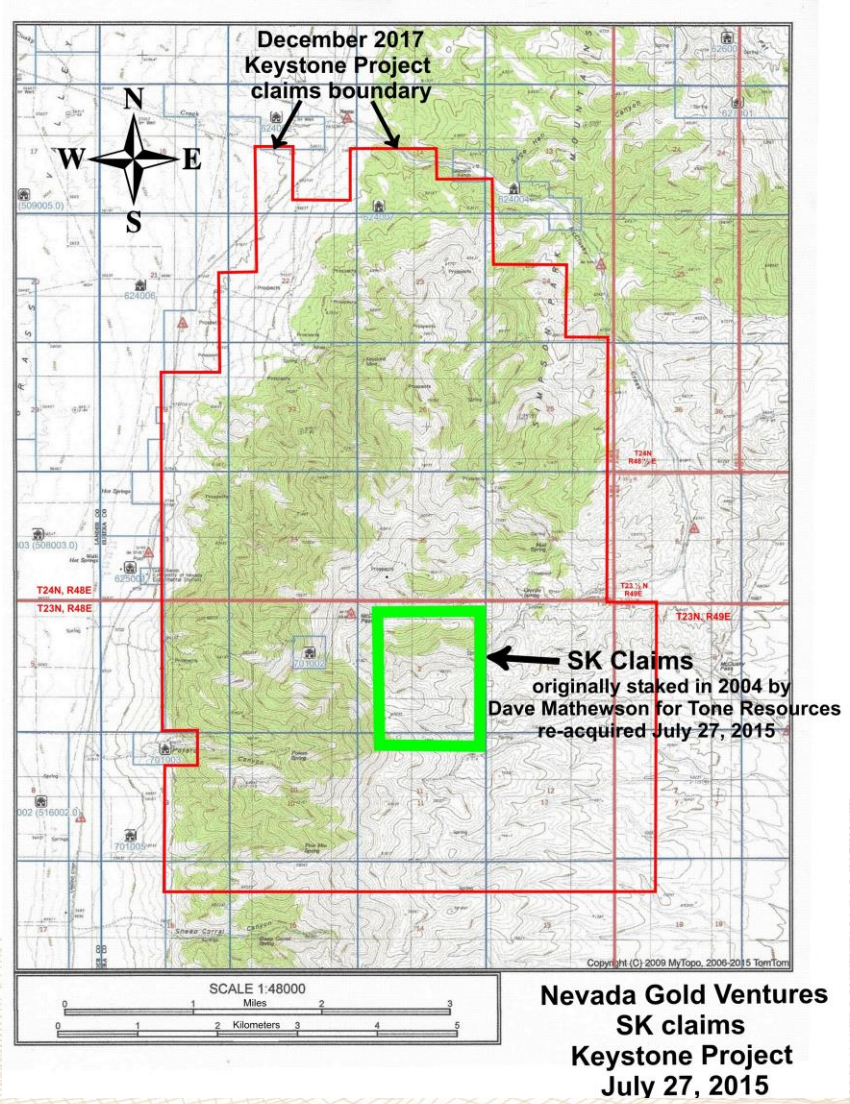
Keystone target area acquisition history

- Dave Mathewson became “interested” in Keystone beginning in 1984 while employed by Atlas Corp (Atlas Precious Metals, Inc.) as a regional generative geologist.
- The Keystone area land positions were fragmented with multiple owners and acquisitions were problematical.
- Keystone geology and prospectivity were poorly understood and certainly under-appreciated, i.e. no Pipeline, Cortez Hills, Goldrush, etc. reference.
- Typical 1980’s drilling: conventional and RC looking for shallow oxide, gold mineralization.



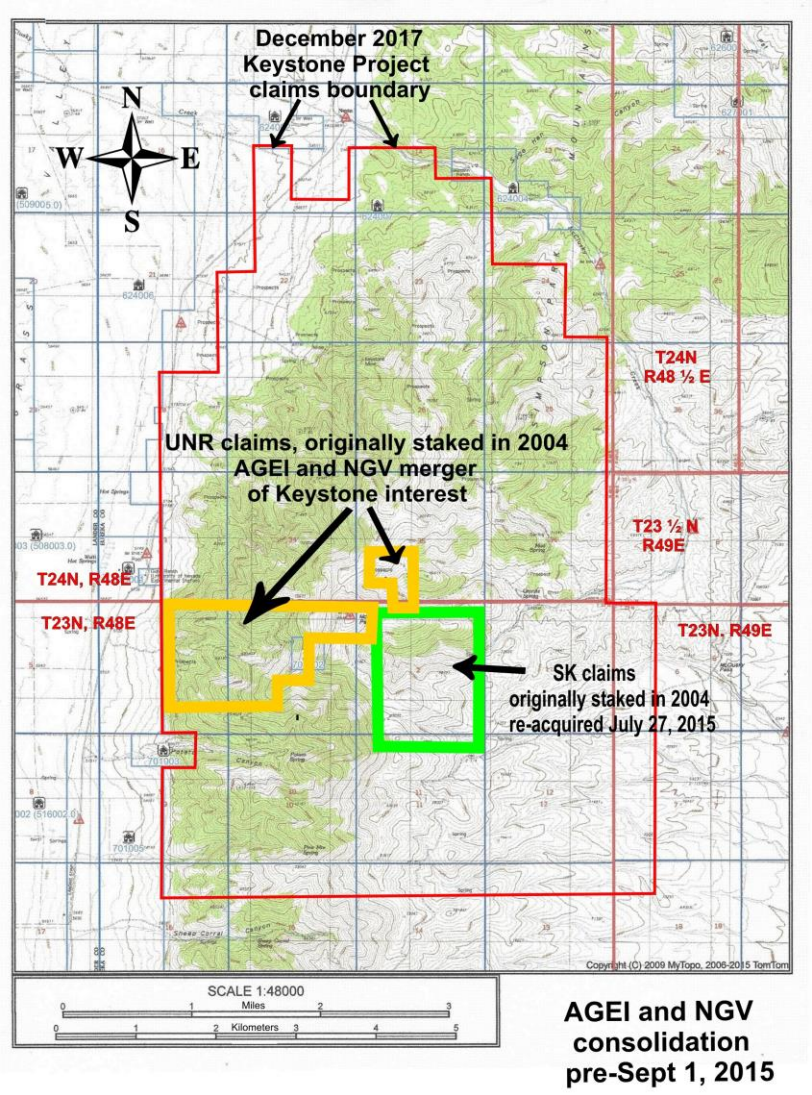
March 2004: foundational claim block of the Keystone acquisition

- SK claims originally staked by Dave Mathewson in March 2004 and vended into Tone Resources; subsequently US Gold/McEwen Mining Co
  - These SK claims were staked because of the presence of a linear trend of gravity highs indicated by Lisle gravity, apparent doming, and surface alteration identified by Dave Mathewson.
- 2004 was shortly after the time of the Cortez Hills discovery. Adjacent areas to the west were simultaneously being staked by Don McDowell, and to the north by Nevada Pacific Gold.
- Placer Dome acquired the McDowell and Nevada Pacific Gold properties and conducted a small amount of drilling before Barrick dropped the project in 2005.



August, 2015: Nevada Gold Ventures- America's Gold Exploration combination

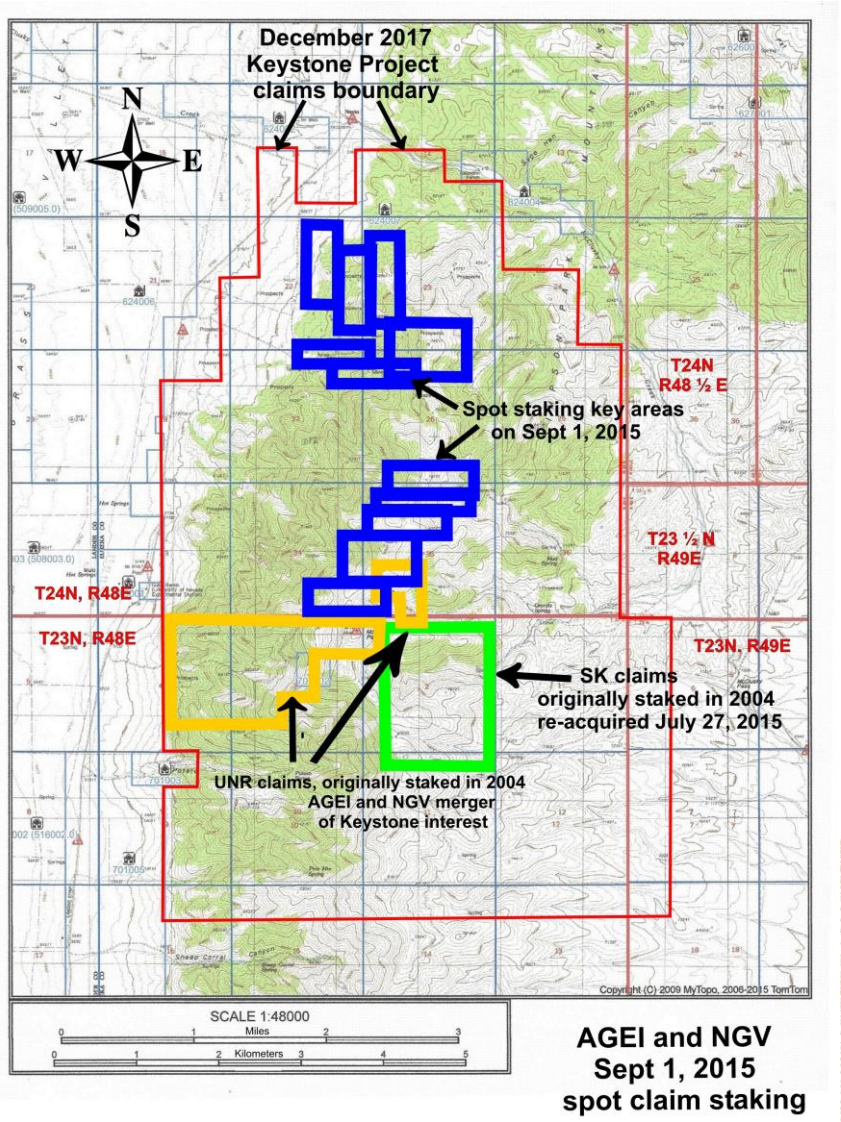
- Nevada Pacific Gold and Tone Resources were acquired by US Gold (McEwen Mining) in 2006.
- Not much happened at Keystone between 2006 and 2015.
- SK claims quitclaim to Dave Mathewson July 27, 2015.
- Dave Mathewson, Nevada Gold Ventures, and Donald McDowell, Americas Gold Exploration, partnered for additional acquisitional purposes in August, 2015.



September 1, 2015

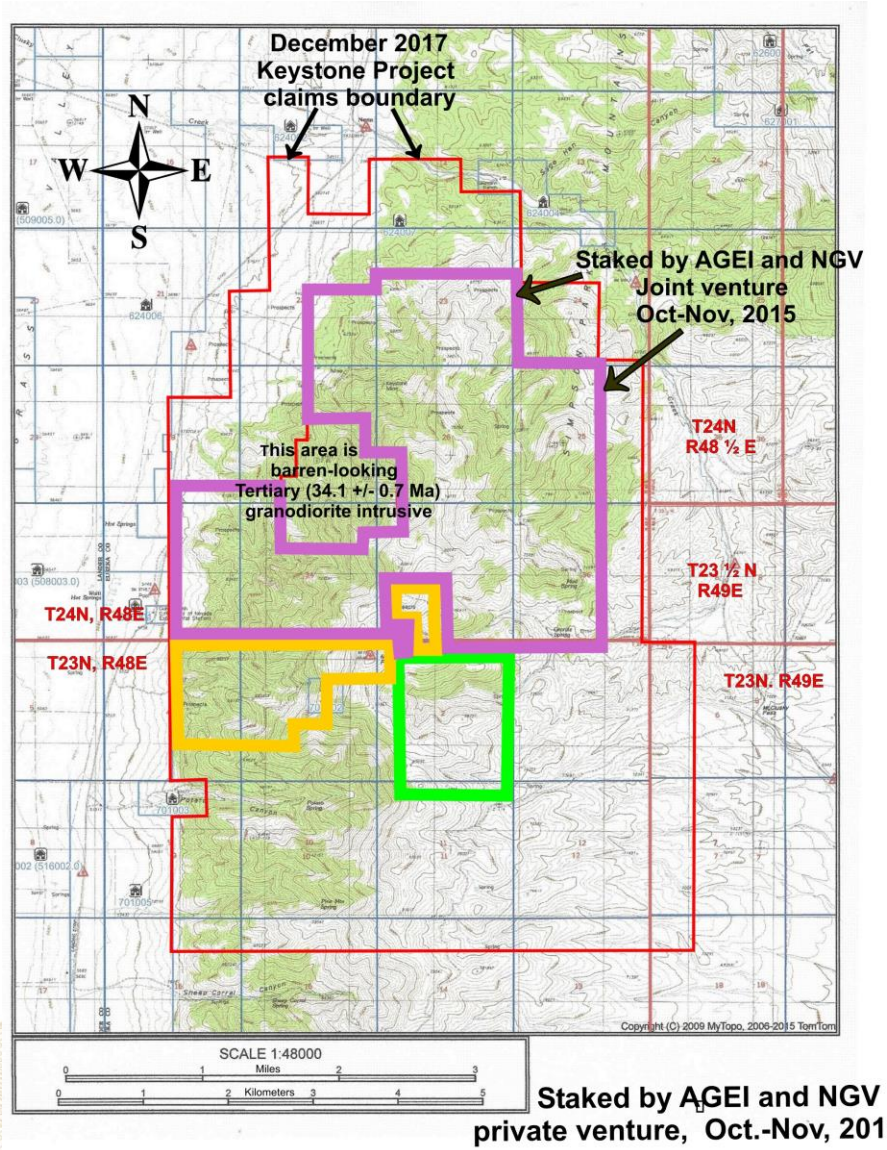
- Northern area properties originally staked by Nevada Pacific Gold in 2004, became available for staking Sept 1, 2015.

- Don McDowell and Dave Mathewson selectively spot-staked several small claim groups Sept. 1, 2 and 3 for the purpose of “thwarting” competitor staking; it worked!



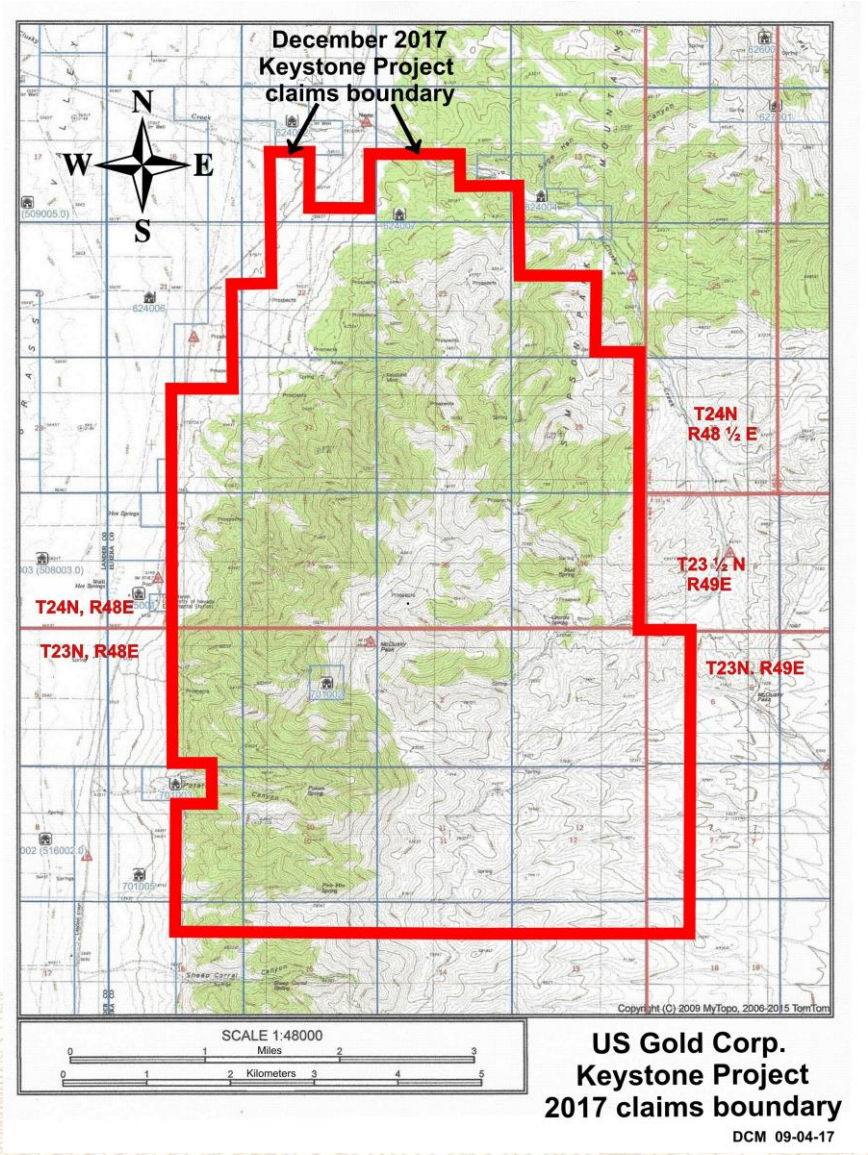
Blanket claim staking northern area

- Late 2015, “spot claims” were replaced by a couple hundred contiguous, “blanket” claims.
- The initial Keystone land position was thereby contiguously organized.
- The property position/ opportunity was presented to the “industry.”



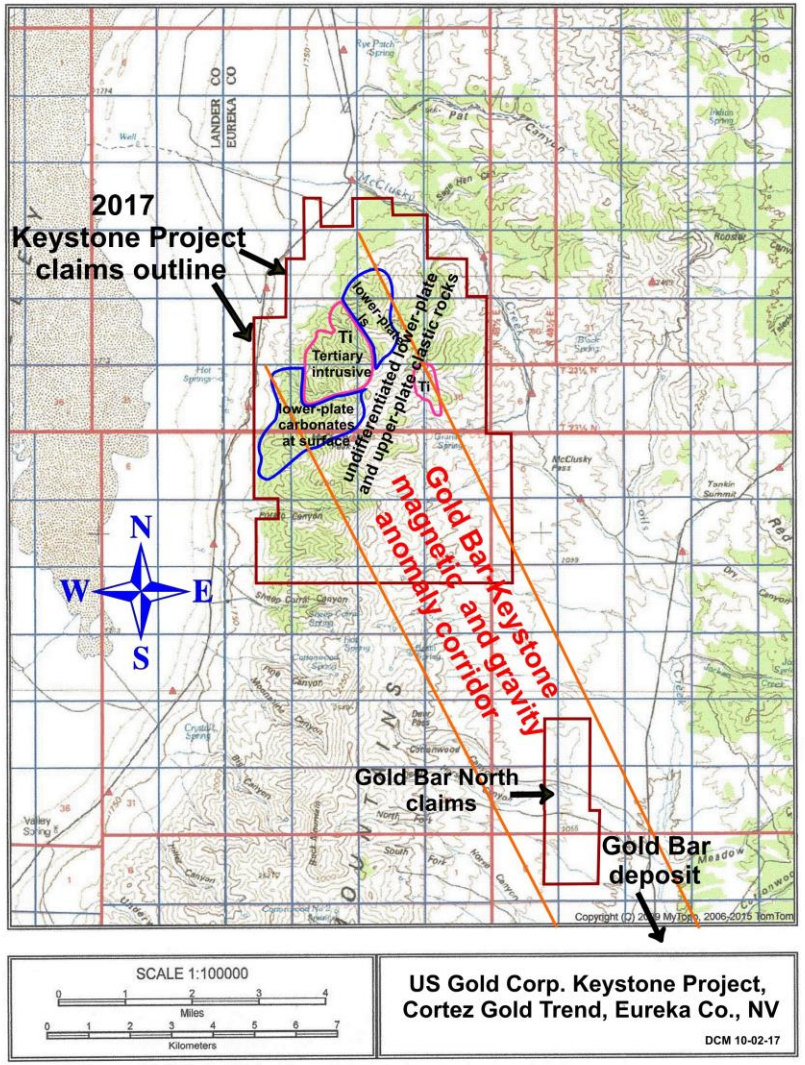
2016 and 2017 district USAU consolidation-expansion

- Dataram, Nasdaq (DRAM) later to become US Gold (USAU) acquired the Keystone asset mid-2016.
- Voluminous available data were organized, assessed, and a 6 hole scout core hole program was immediately implemented.
- Five of six planned holes were completed prior to the end of the 2016 field season.
- Important geologic information was obtained from these wide-spaced vertical core holes drilled to up to 1742ft. One hole was lost because of very difficult drilling. The planned 6th hole was completed early in 2017.



Pre-2016 Keystone Project Highlights

- Keystone District exhibits strong, widespread alteration characteristics.
- Keystone geology has been very misinterpreted and poorly understood.
- Prior drilling was mostly shallow and, or focused on non-Carlin type gold settings.
- However, prior drilling did locally encounter intercepts of gold have been encountered in areas of surface anomalies, examples:
  - K-5A 475-575’ 100’ 0.015 opt Au
  - WK-81-1 0-60’ 60’ 0.010 opt Au
  - WK-81-15 100-120’ 20’ 0.048 opt Au
  - WK-88-2 70-250’ 180’ 0.015 opt Au
  - WK-88-6 5-25’ 20’ 0.051 opt Au
  - 89-2/90-1 410-695 285’ 0.016 opt Au

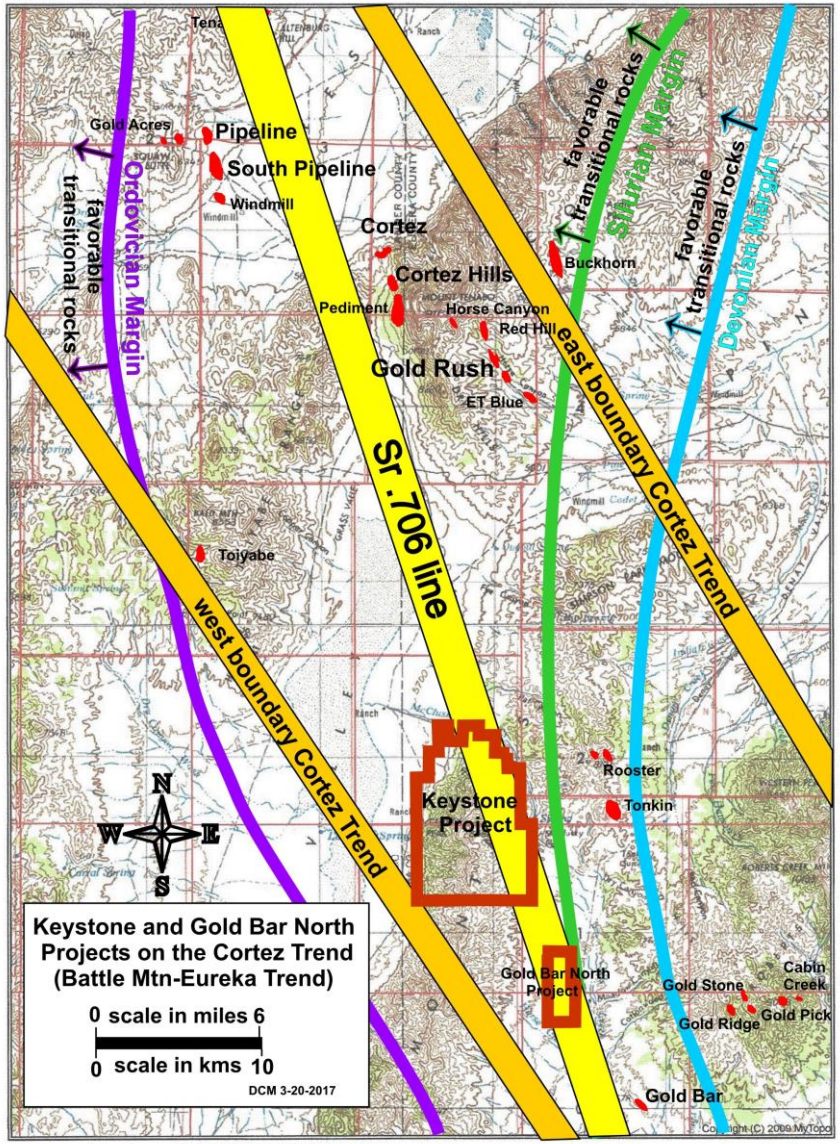


Keystone Project - Cortez Trend location

LOCATION…

LOCATION...

LOCATION…!!!

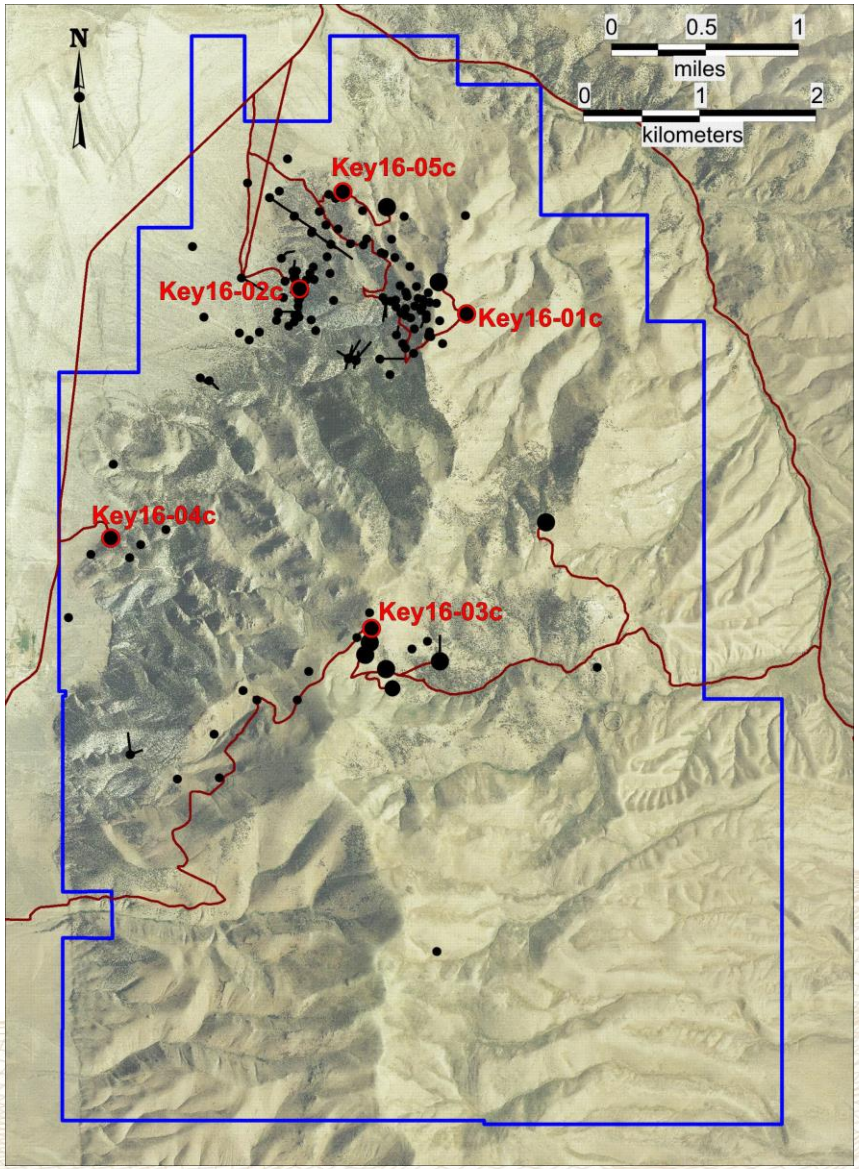


2016 Scout core holes

US Gold Drilling (2016)

Historical Drilling

- Historic drilling at Keystone was comprised of about 240 holes drilled to an average depth of about 300 feet mostly by conventional rotary and reverse circulation methods.
- Most prior exploration focus was in pursuit of shallow oxide targets and the Keystone skarn mineralization.
- US Gold Corp launched a core-hole scout drilling program late in 2016.
- US Gold holes “targeted” the need for stratigraphic and lithologic information and deposit model information to depths of up to about 1800 feet.
- Considerable advancement in geological knowledge resulted.

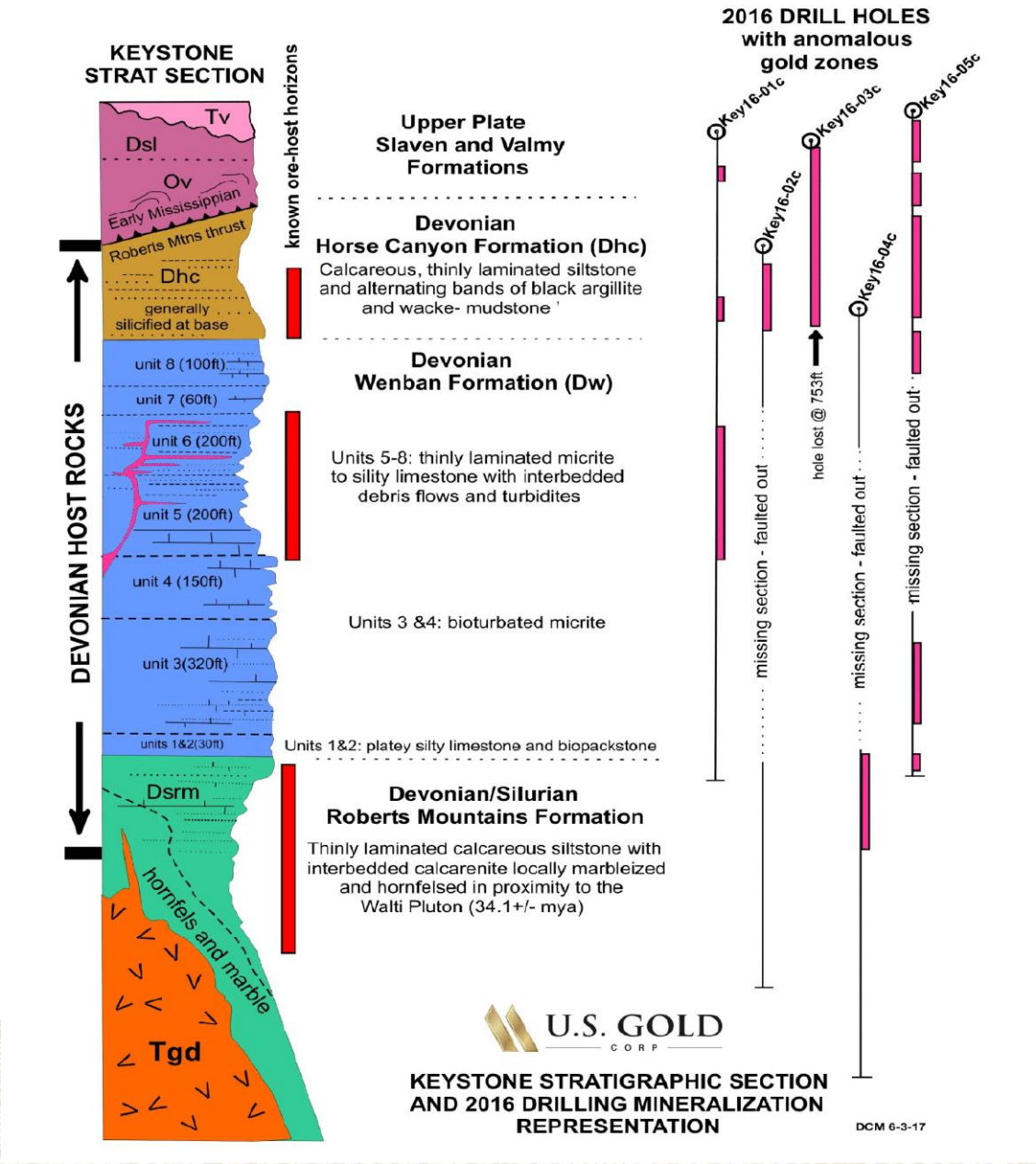


2016 Drill Results

- All drill holes intersected thick intervals of permissive host rocks at shallow target depths.
- All drill holes encountered thick intervals, albeit low levels, of gold and associated, locally strong, pathfinder metals.
- Drill holes confirmed the presence of, and permissivity qualities of Devonian Horse Canyon, Wenban limestone Formations, and also Roberts Mtn Formation.
- Drill holes encountered multiple jasperoid zones, decalcified zones, fine-grained intrusives as sills, and associated large, dissolution and collapse breccia bodies.

2016 Scout Drill Holes Summary

2016 USAU drill holes related to known Cortez area stratigraphy and deposit locations

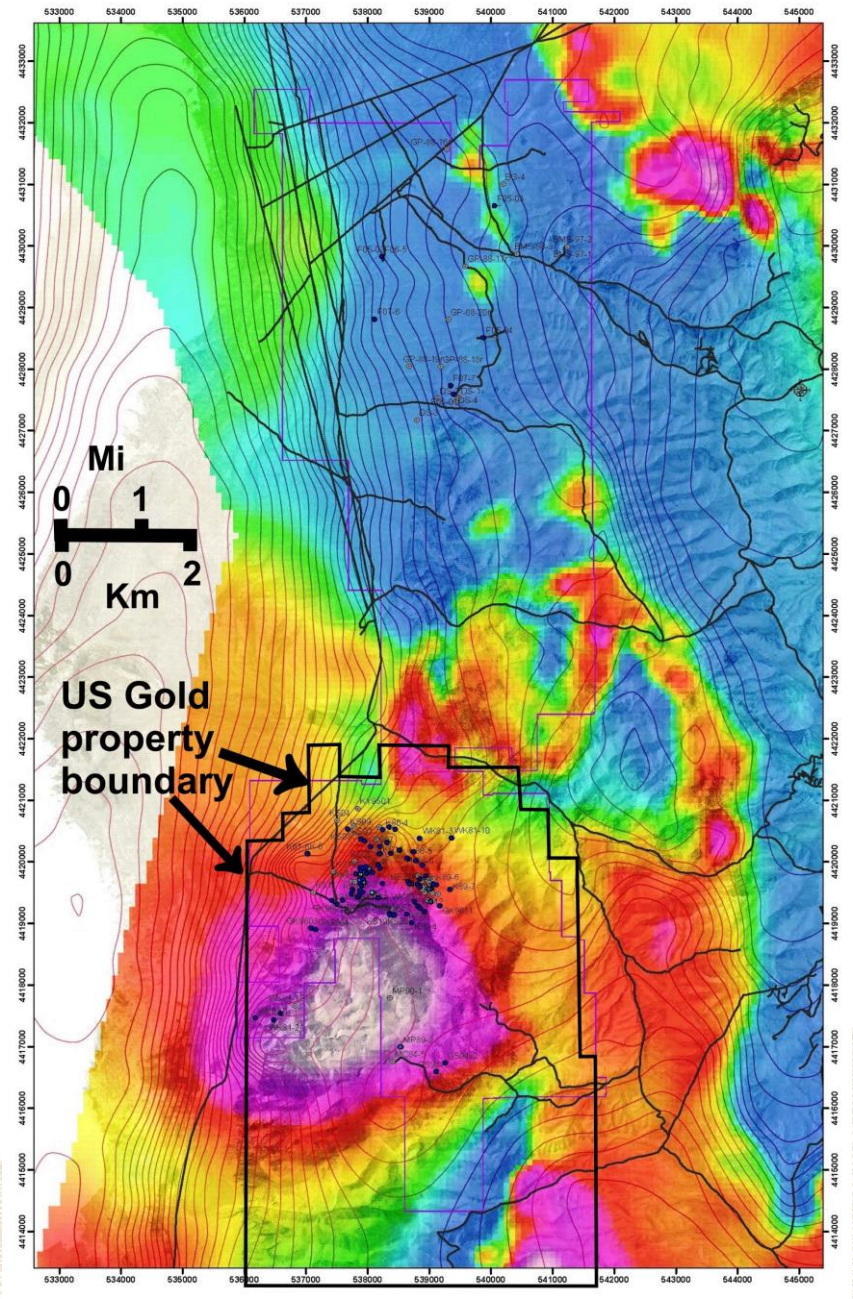


Regional Aeromagnetics

- Magnetic expression is several times larger than the surface exposure of the Keystone intrusives, analogs include Marys Mtn and Richmond intrusives on the northern Carlin Trend, Bullion intrusive on the southern Carlin Trend, and Gold Acres on the Cortez Trend.

- A portion of this magnetic anomaly may result from magnetite and pyrrhotite skarn and hornfels, confirmed in US Gold drill holes.

- Intrusives: the “mechanism(s)” that drove the system(s).

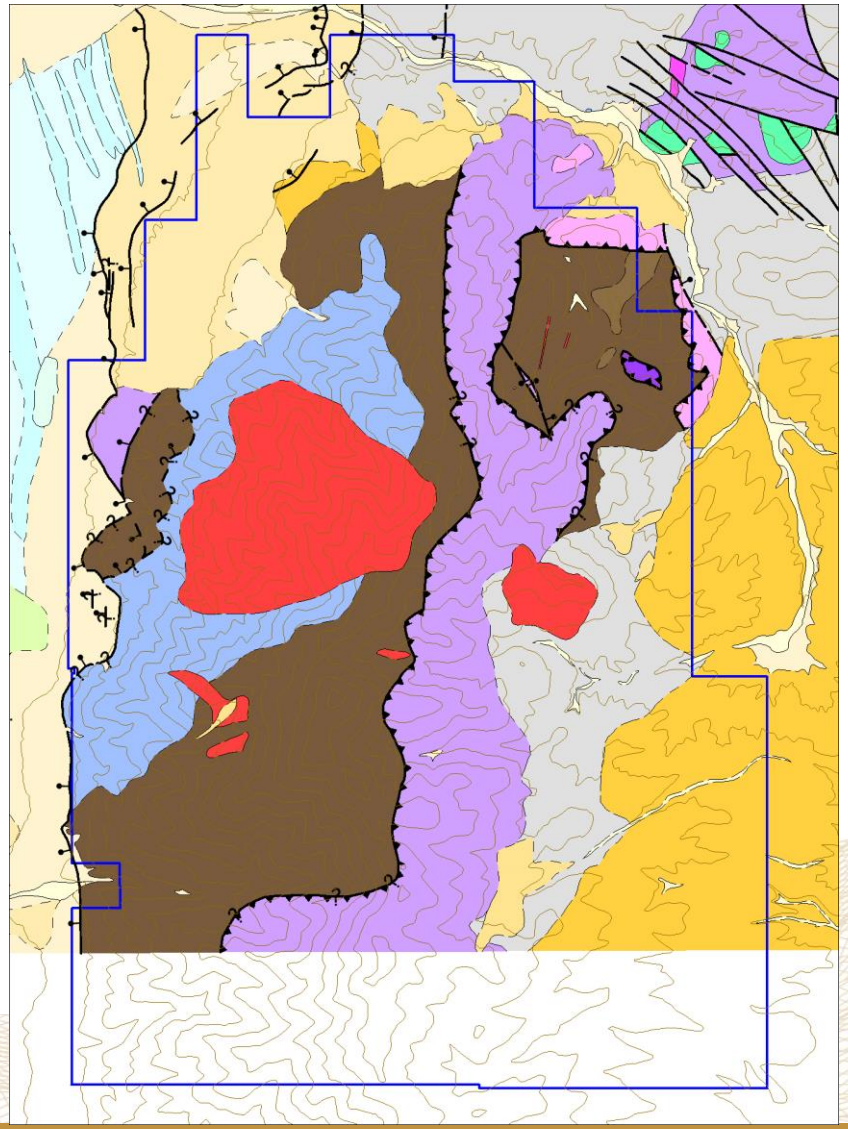


Keystone General Geology

Pre-2017 Geology

EXPLANATION

- Quaternary younger alluvium in small valleys
- Quaternary younger alluvial fan deposits
- Quaternary landslide deposits
- Quaternary pluvial lake bottom deposits
- Quaternary pluvial lake shoreline deposits, undivided
- Quaternary older alluvial fan deposits
- Tertiary conglomerate and gravel (1.8-5.3 Ma)
- Tertiary andesite and dacite (34-37 Ma)
- Tertiary granodiorite and other granitic rocks (34-37Ma)
- Cretaceous Newark Canyon Formation: sandstone, limestone
- Devonian Horse Canyon Unit: limestone
- Devonian Horse Canyon Unit: siltstone
- Devonian Wenban Formation, undivided
- Ordovician Valmy/Vinini Formation: quartzite, sandstone
- Ordovician Valmy/Vinini Formation: chert
- Ordovician Valmy/Vinini Formation: greenstone



2107 Cross-sectional schematic of Keystone

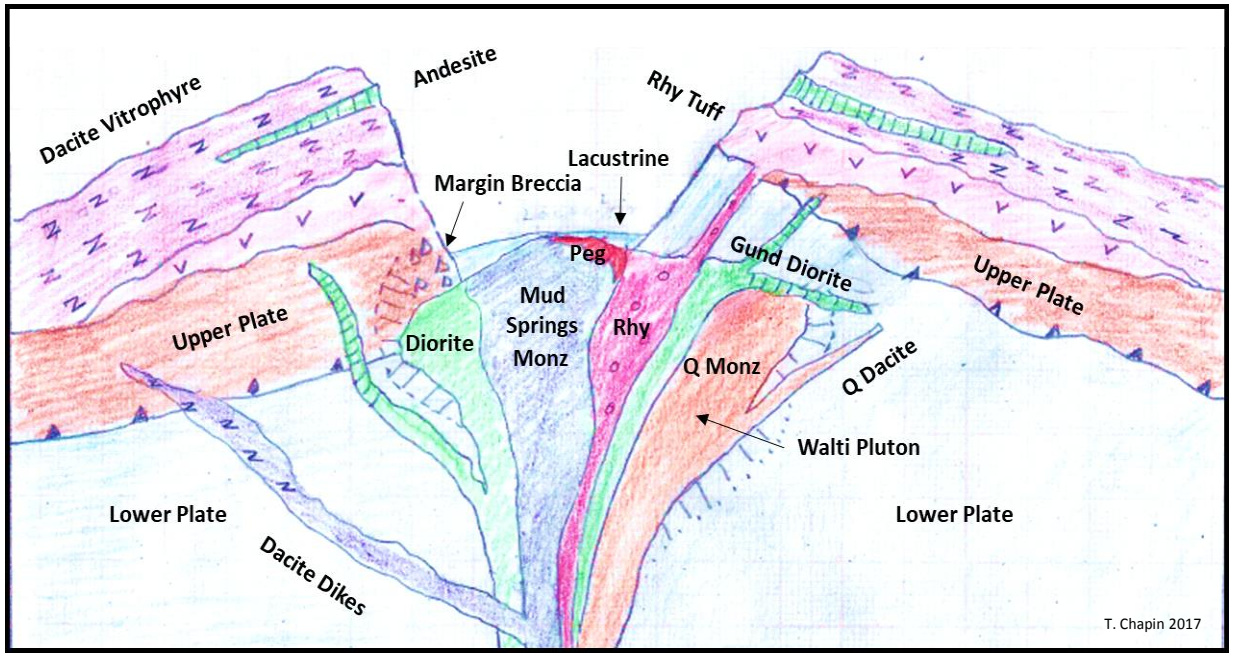
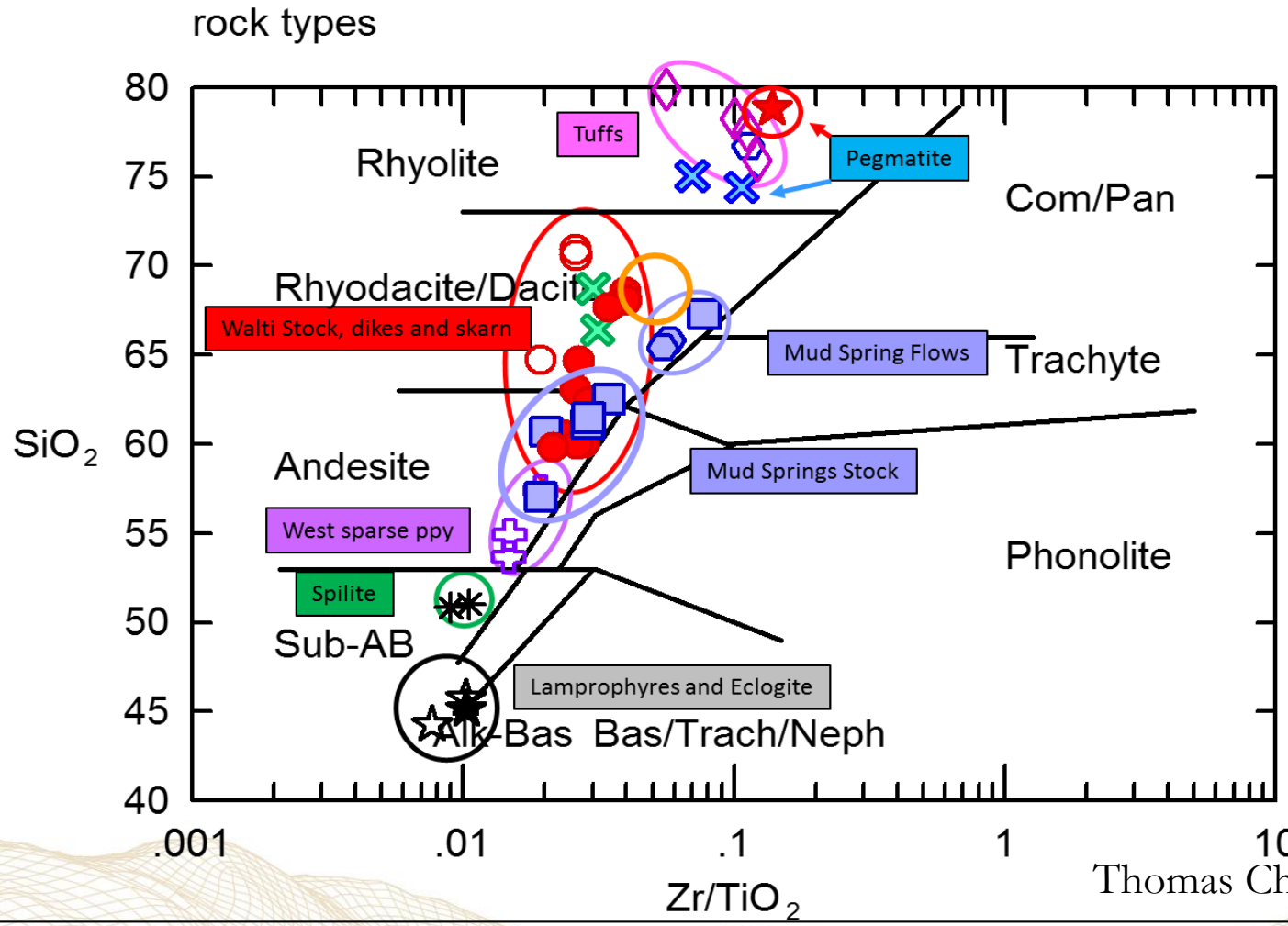


Figure : Schematic sketch of the volcanic complex underlying the Keystone Project. The Paleozoic sediments are intruded by a complex of intrusions ranging from diorite to quartz rhyolite. Each intrusion has a set of daughter dikes and extrusive facies. The hypabyssal rhyolite creates a quartz rich rhyolite tuff that overlies the Upper Plate on both sides of the dome. The Walti Pluton is Quartz Monzonite and forms a skarn. The Mud Springs Monzonite forms dacite dikes and a thick sequence of dacite vitrophyre. Likewise, the Gund Diorite forms both andesite dikes and some andesite flows. Calcite outcrops and quartzite meta breccia outcrops overlie and flank three sides of the Mud Springs Pluton suggesting that the pluton is overlain by a crater lake.

Thomas Chapin, 2017

Keystone Intrusives Compositions

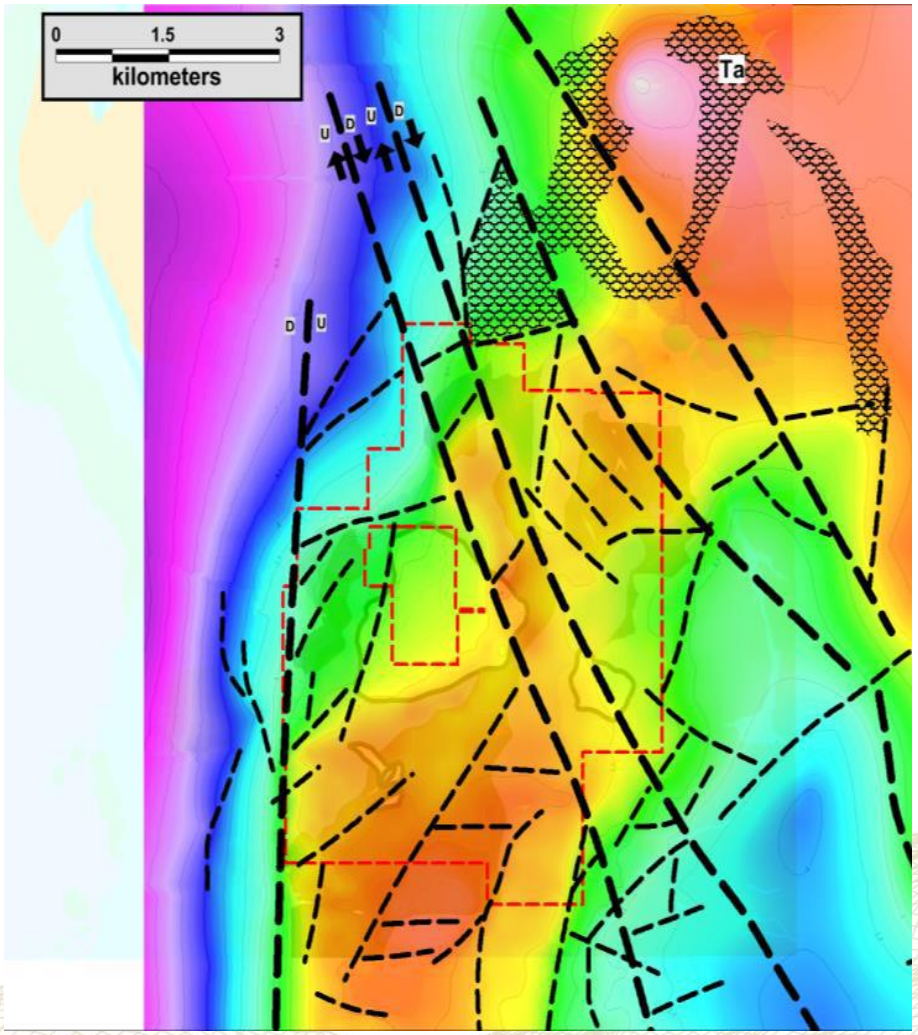


Thomas Chapin, 2017

Figure : Win Floyd Diagram. Blue is related to Mud Springs Stock, Red is related to Walti Stock. Tuffs red and blue open patterns. Red star and blue Xes are pegmatites. Green Exes are skarn related to the Walti Stock. Mauve plusses are andesite dikes within upper plate. Black asterisks - greenstone from upper plate. Black stars have lamprophyre textures, filled star is eclogite xenolith presumably from Walti Stock

Keystone 2016 Exploration Program Summary

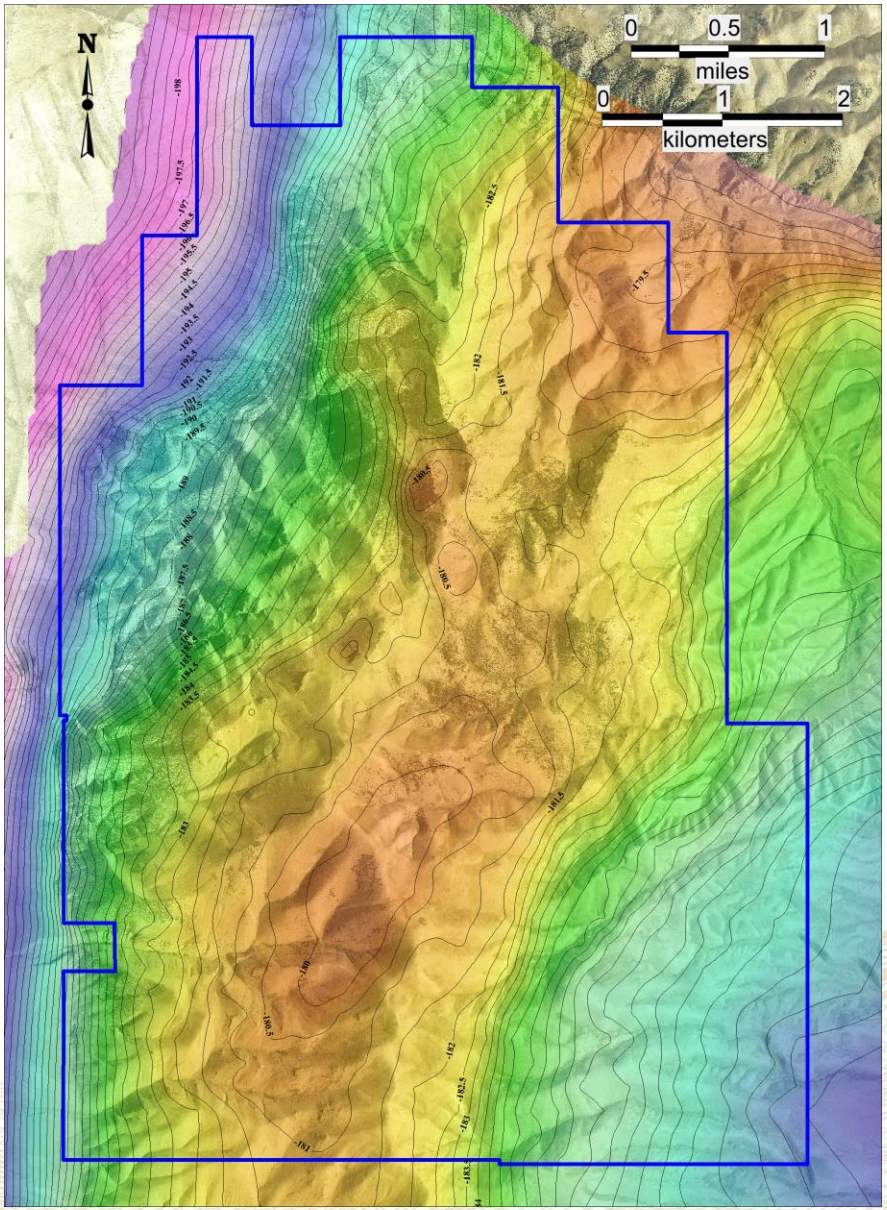
- Digital data organization and map representation program led by Joe Laravie.
- Engaged Tom Chapin as Senior Consulting Geologist; mapping geology of entire district in detail.
- Completed property wide gravity survey in July, 2016 guided by Jim Wright of Wright Geophysics.
- Staked additional contiguous property largely based on gravity results; property now at 650 claims.
- Drilled 5 “scout” core holes under 3 NOI’s.
- Commenced field studies for EA and future plan of operation (POO); expected time of completion early 2018.



APPLICATION OF GRAVITY

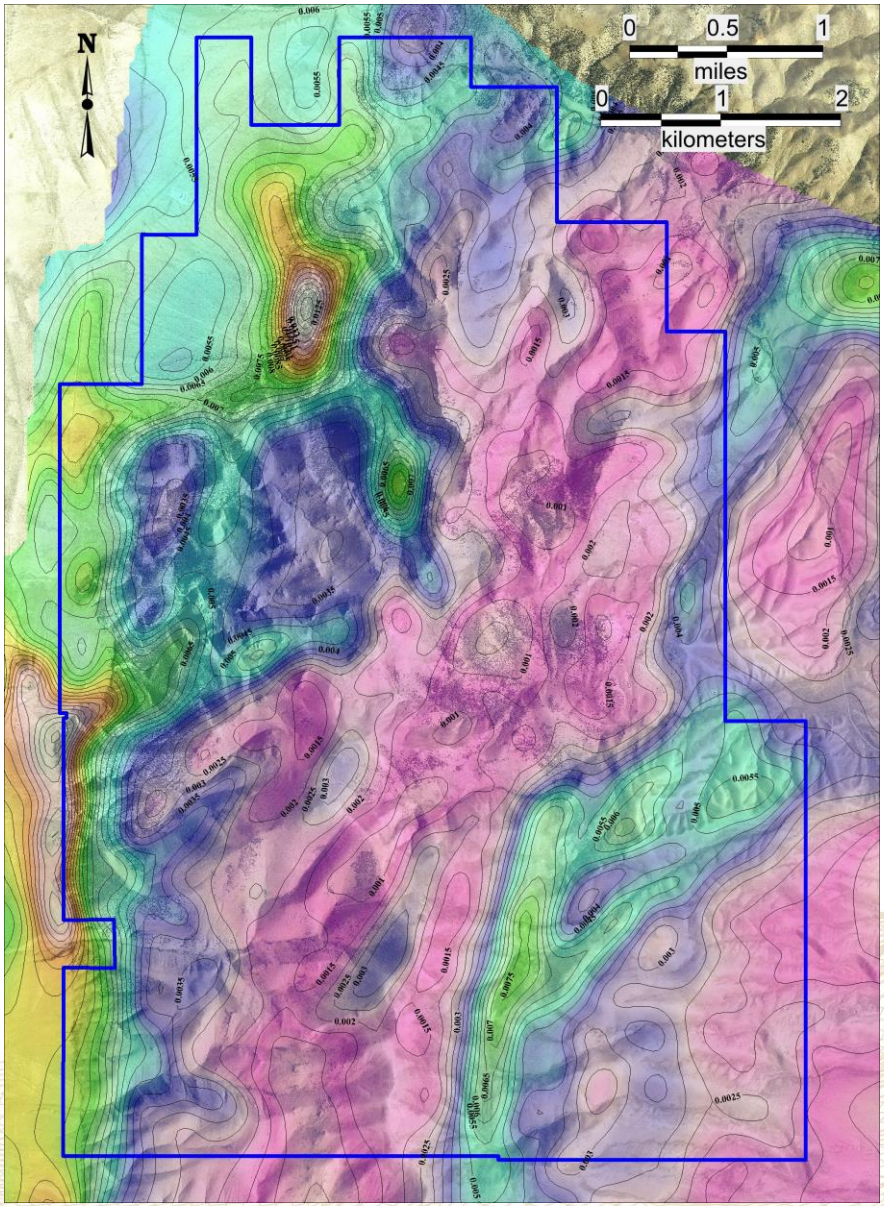
Keystone CBA Gravity wo Interpretation

Just Data



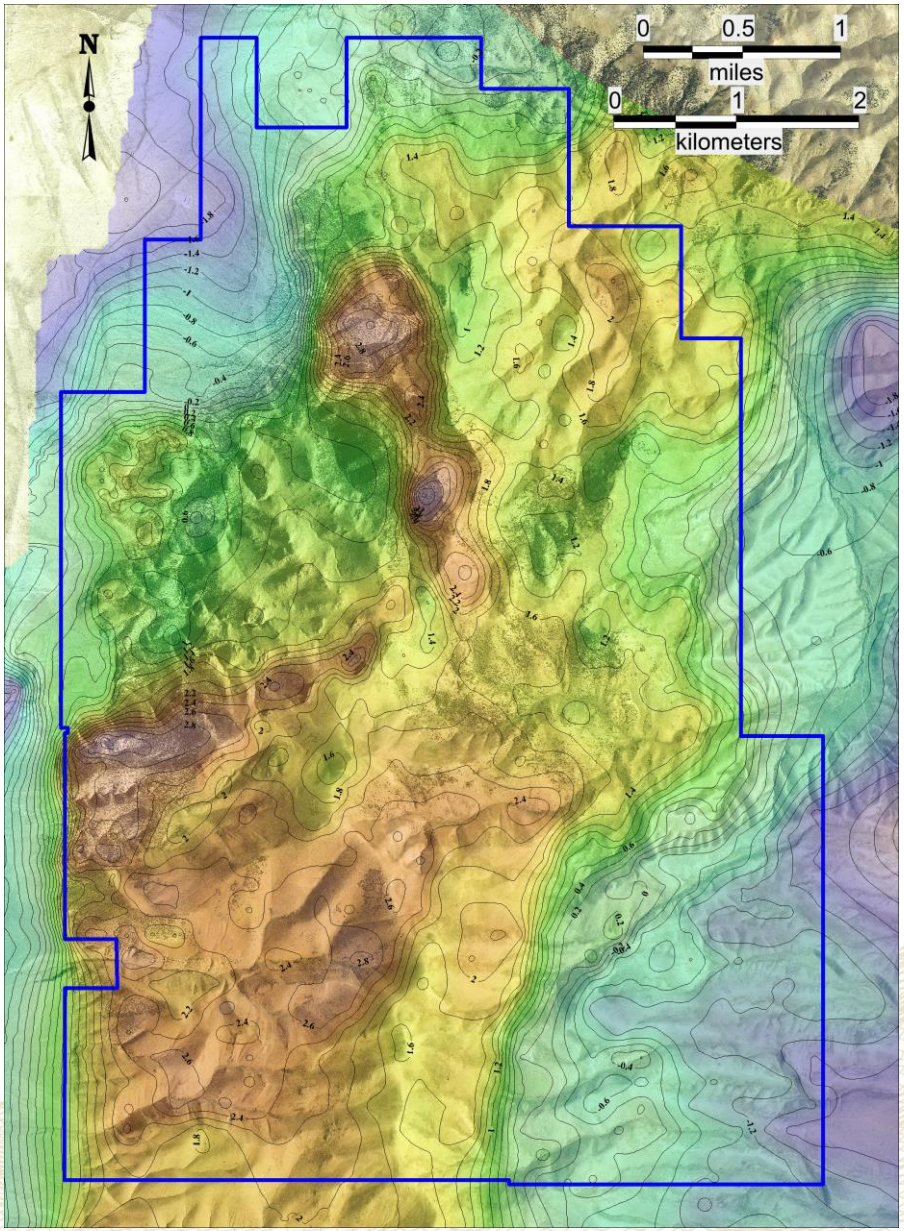
Keystone Gravity Gradient wo Interpretation

The mathematics



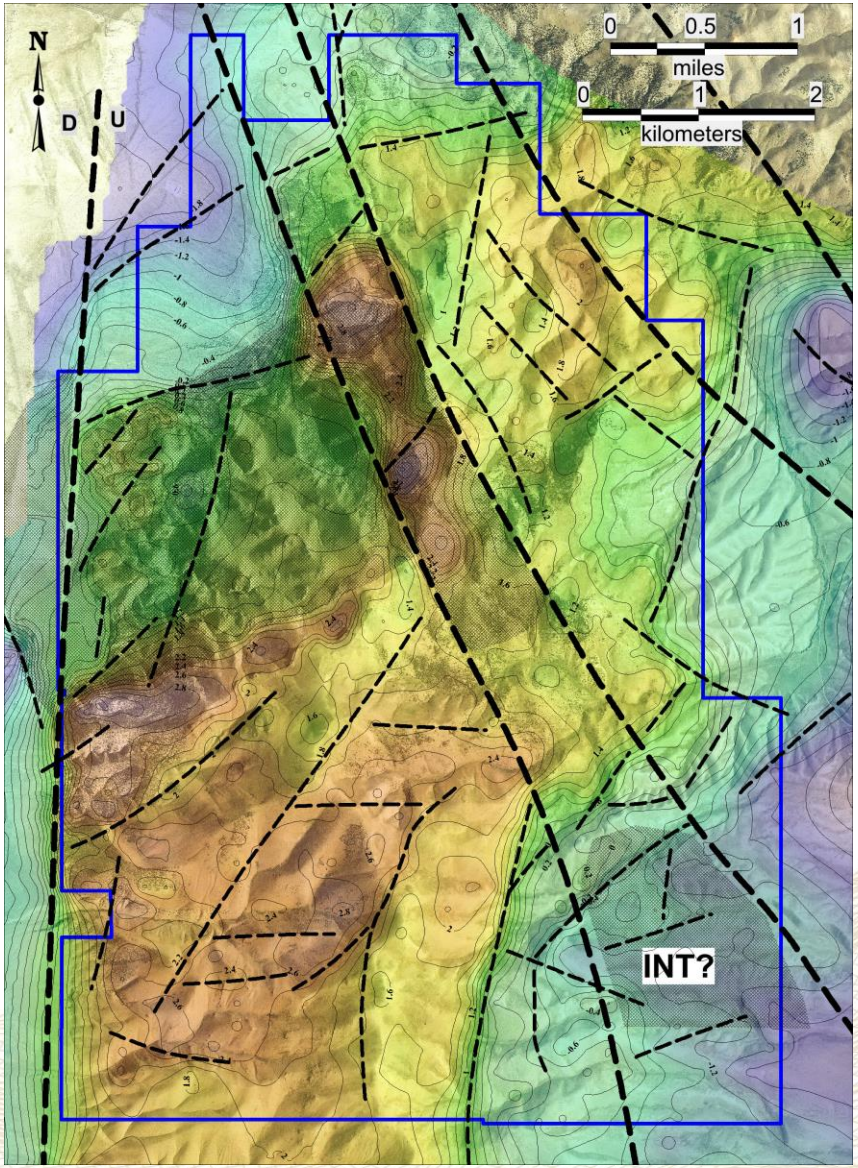
Keystone Gravity Residual wo interpretation

The visual enhancements



Keystone 2017 Residual Gravity with interpretation

- Data clearly put more dense lower plate carbonate units at shallow depths.
- Interpretation of data exhibits a strong NNW-trending structural zone not previously known.
- Secondary NE and NS structural patterns are also indicated. Additional data were obtained early in 2017 to provide better definition on several gravity lows present within the NNW trending corridor.
- Three “scout holes” were drilled in late 2017 to provide an initial drill assessment of three of these lows.

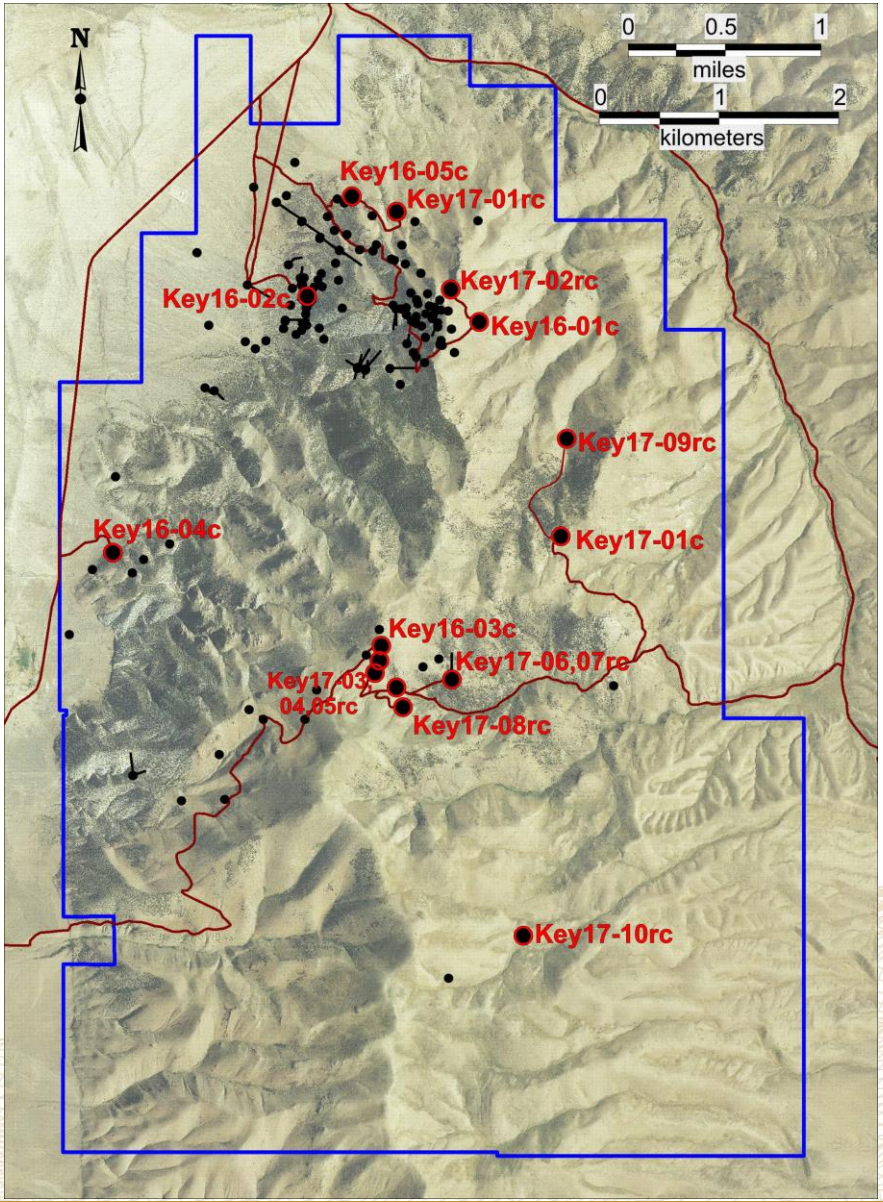


Keystone 2017 Drill hole Program

US Gold Drilling (2016-2017)

Historical Drilling

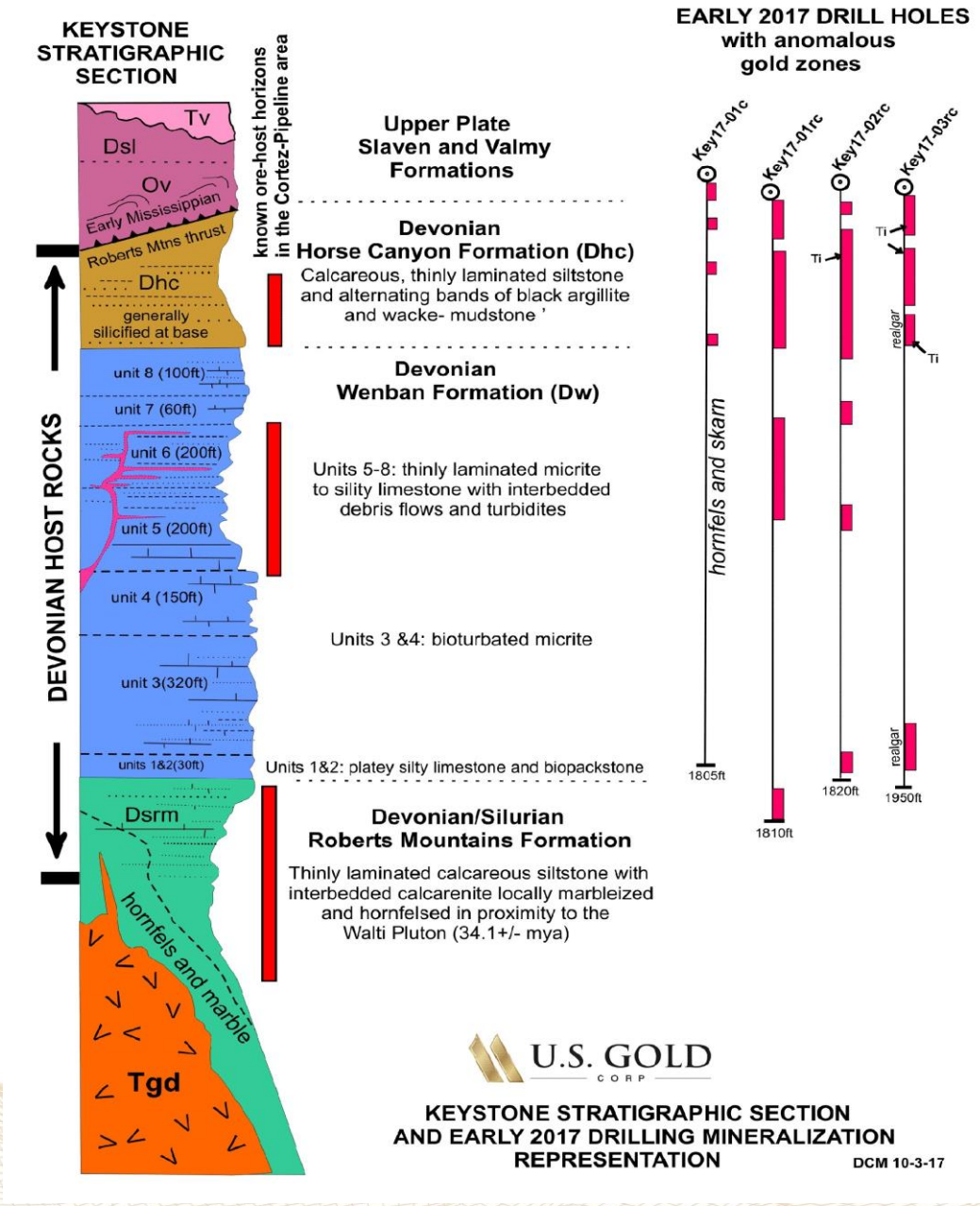
- Forth NOI designed.
- Eleven holes drilled in 2017; one currently in progress.
- Key17-01c was drilled to complete the 6 hole core program started in 2016.
- Ten reverse circulation holes drilled to an average depth of about 1800 ft.
- Drill focus was on follow-up of earlier results, offsetting 89-2/90-1 and Key16-03c, and the gravity lows.



2017 Drill Results…mostly pending

2017 Drill Holes Summary

- 2017 drill holes gold and geology related to known Cortez area stratigraphy and deposits



APPLICATIONS OF SURFACE GEOCHEMISTRY (refining targets)

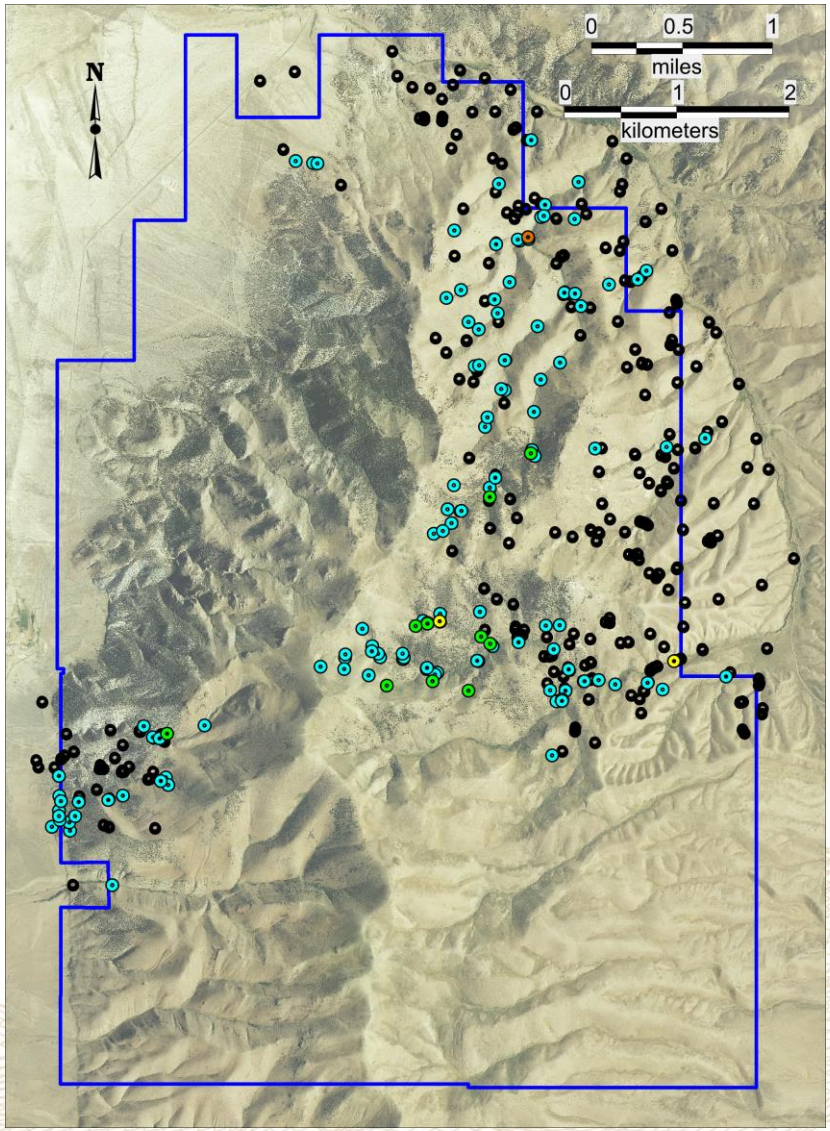
- Stream sediment samples
- Altered cobble samples
- Rock samples
- Soil samples

Keystone Geochemistry-Gold in Stream Sediments

Data as of September, 2017:
411 samples

Gold in Stream Sed (ppb)

- 200 to 500
- 100 to 200
- 50 to 100
- 30 to 50
- 15 to 30
- 5 to 15
- < 5

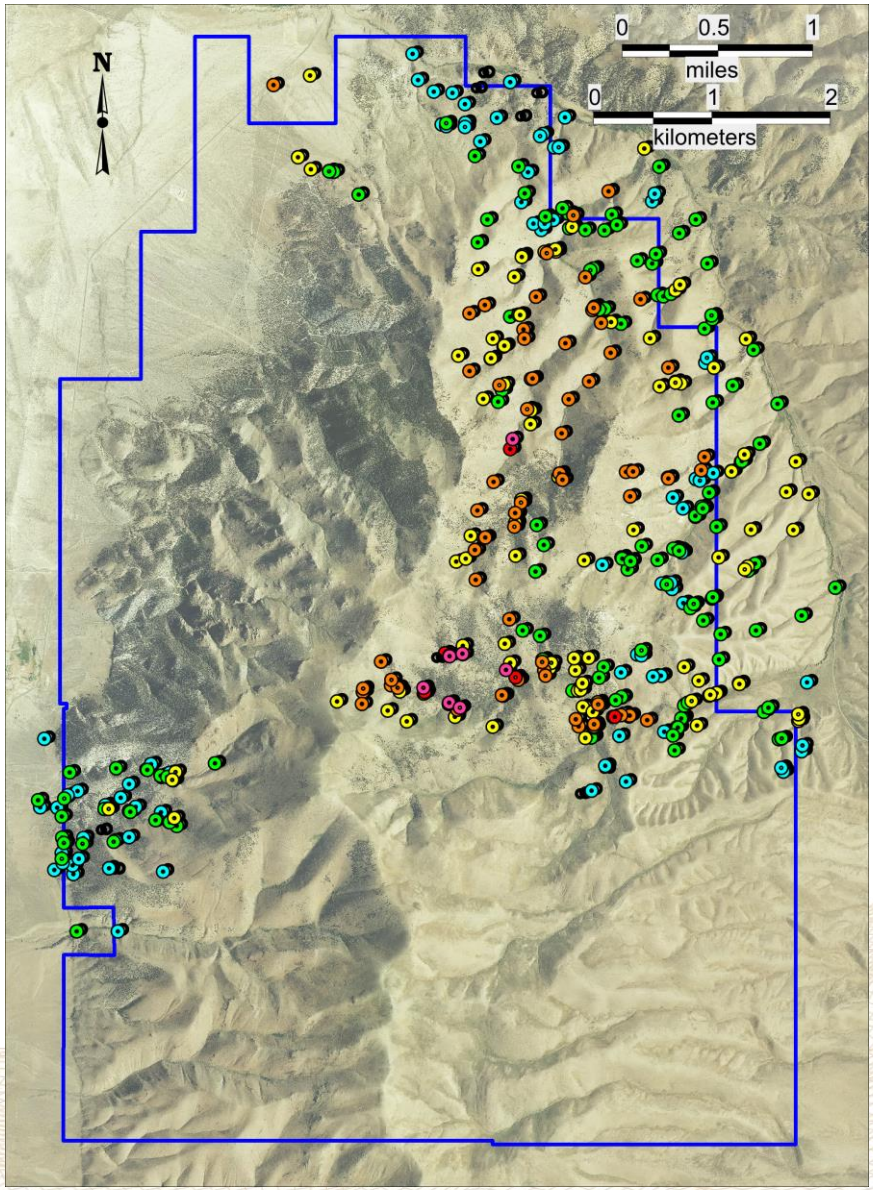


Keystone Geochemistry-Arsenic in Stream Sediments

Data as of September, 2017:
411 samples

Arsenic in Stream Sed (ppm)

- 500 to 1,100
- 250 to 500
- 100 to 250
- 50 to 100
- 25 to 50
- 10 to 25
- < 10

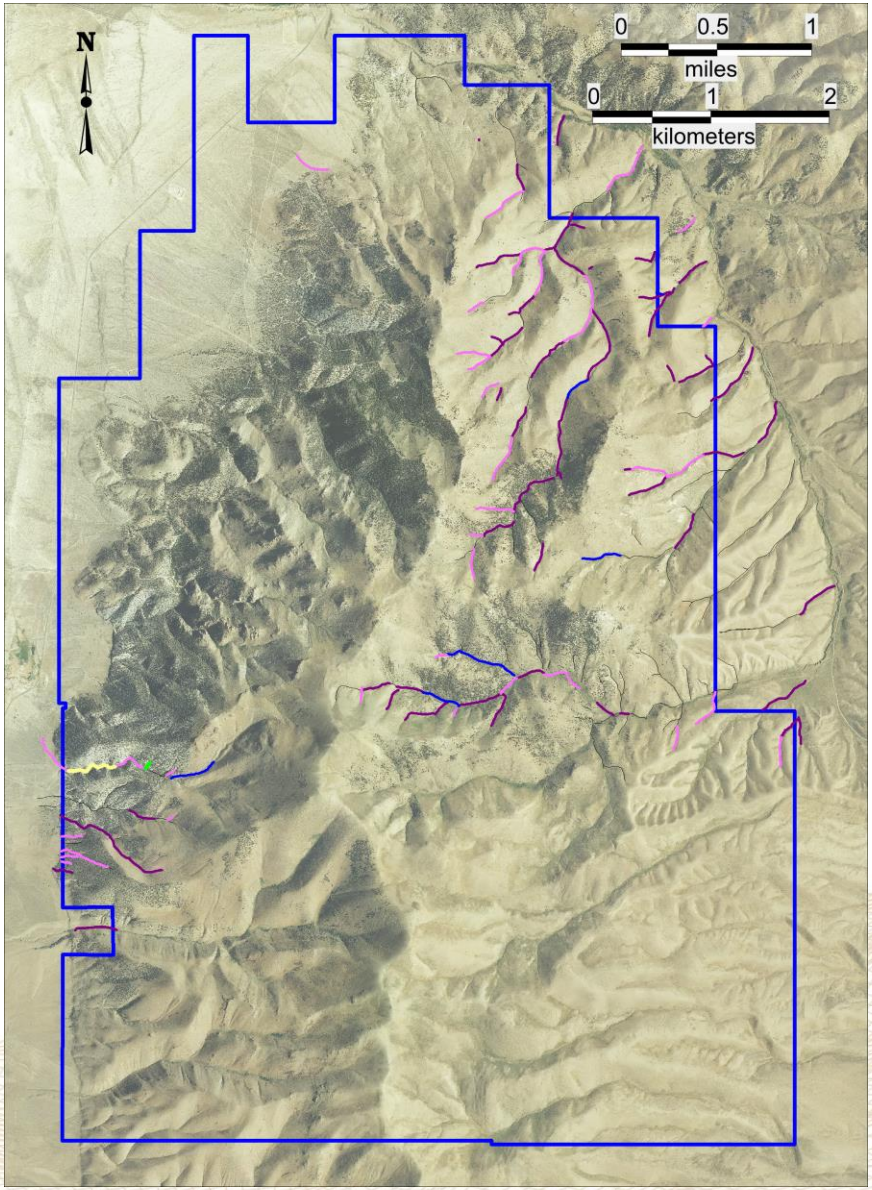


Keystone Geochemistry-Gold in Altered Cobbles

Data as of September, 2017:
409 samples

Gold in Altered Cobble (ppm)

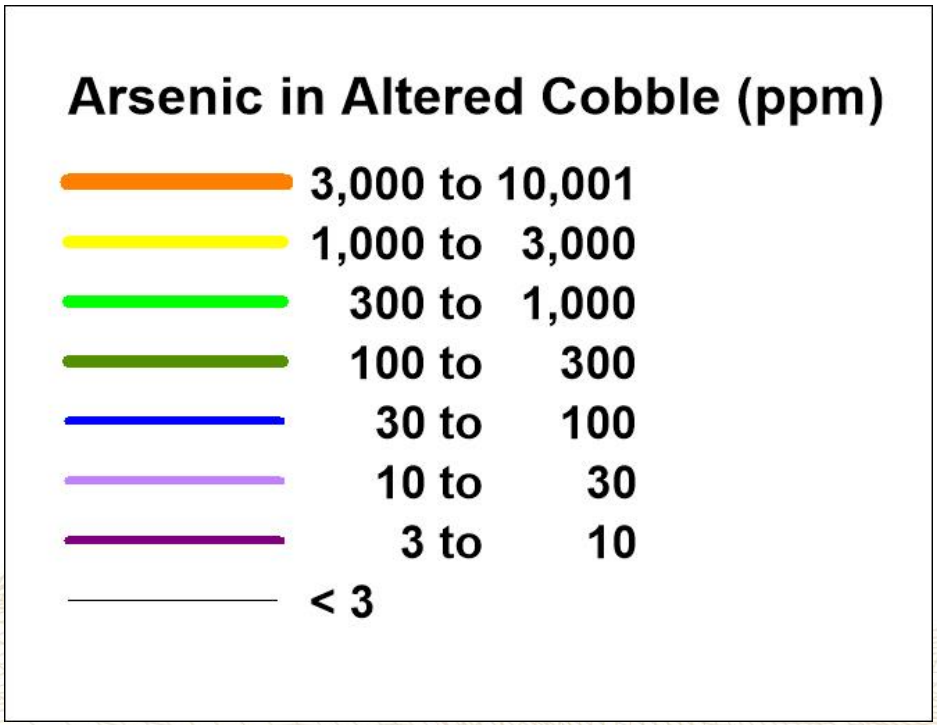
0.3	to 1
0.1	to 0.3
0.03	to 0.1
0.01	to 0.03
0.005	to 0.01
< 0.005	

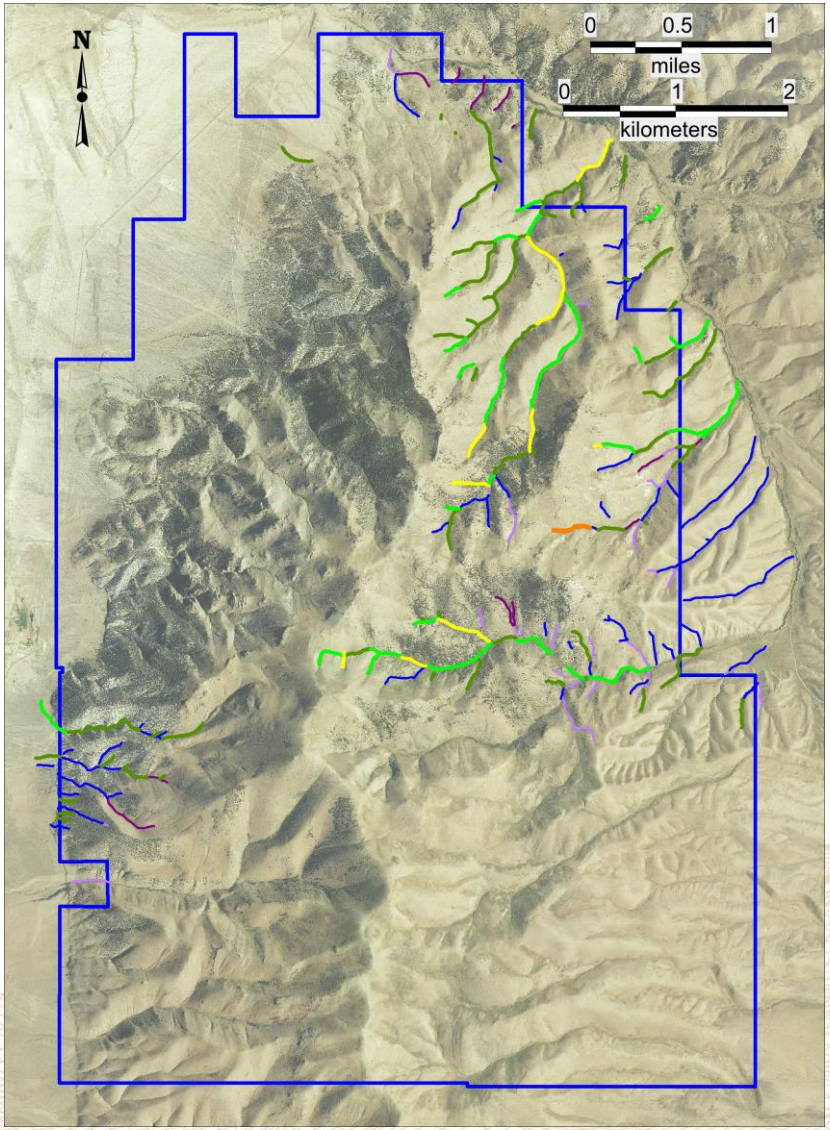


Keystone Geochemistry-Arsenic in Altered Cobbles

Data as of September, 2017:

409 samples



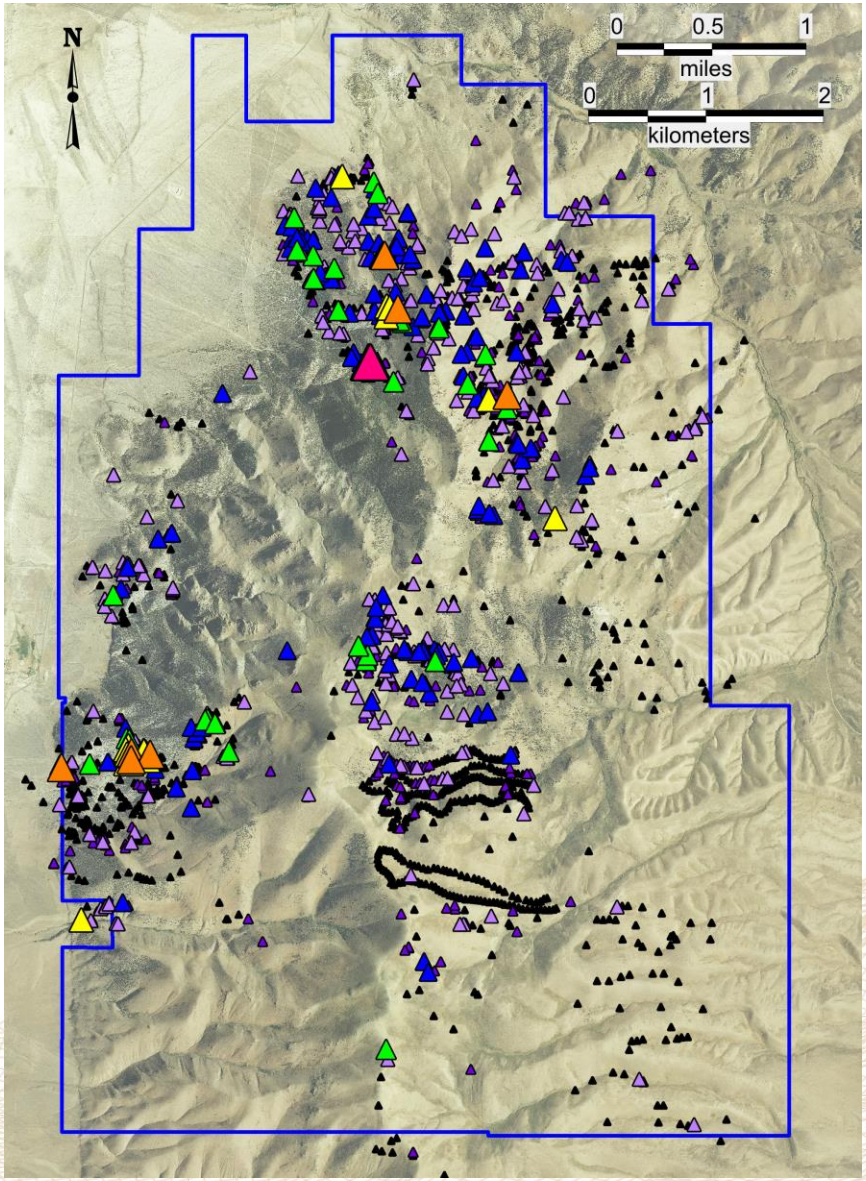


Keystone Geochemistry – Gold in Rock

Data as of September, 2017:
2132 samples

Gold in Rock (ppm)

10	to 30
3	to 10
1	to 3
0.3	to 1
0.1	to 0.3
0.03	to 0.1
0.01	to 0.03
0.005	to 0.01
< detection (.069 to .005)	

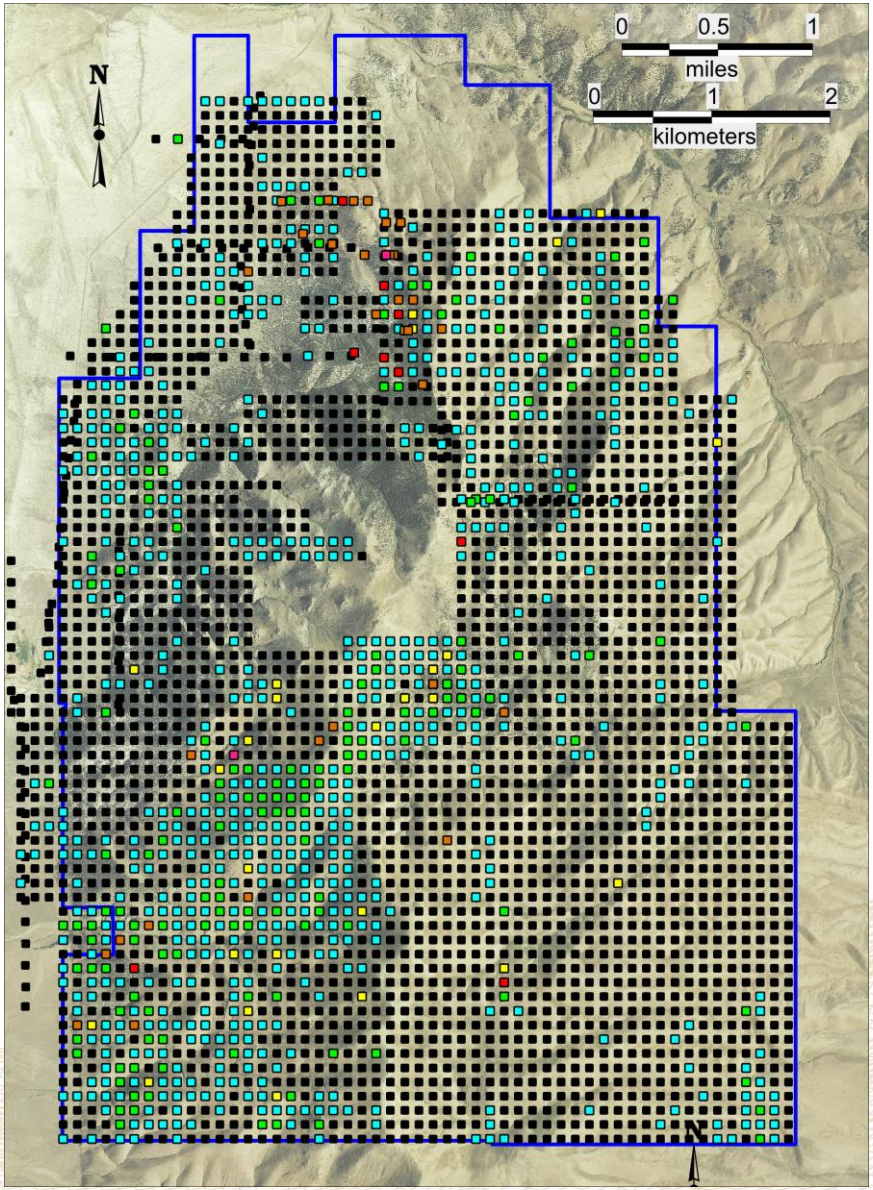


Keystone Geochemistry – Gold in Soils

Data as of September, 2017:
3354 samples

Gold in Soil (ppb)

- 200 to < 500
- 100 to < 200
- 50 to < 100
- 30 to < 50
- 15 to < 30
- 5 to < 15
- < 5

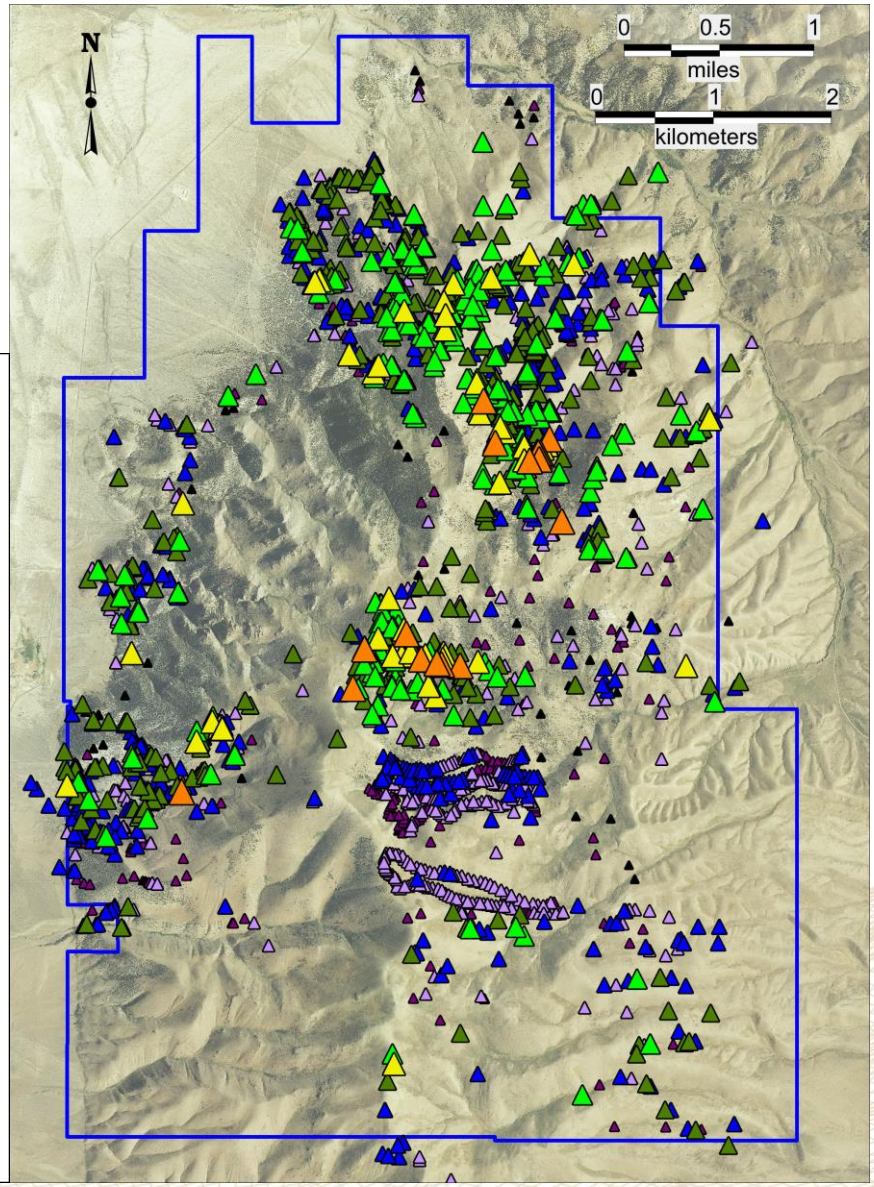


Keystone Geochemistry – Arsenic in Rocks

Data as of September, 2017:
2132 samples

Arsenic in Rock (ppm)

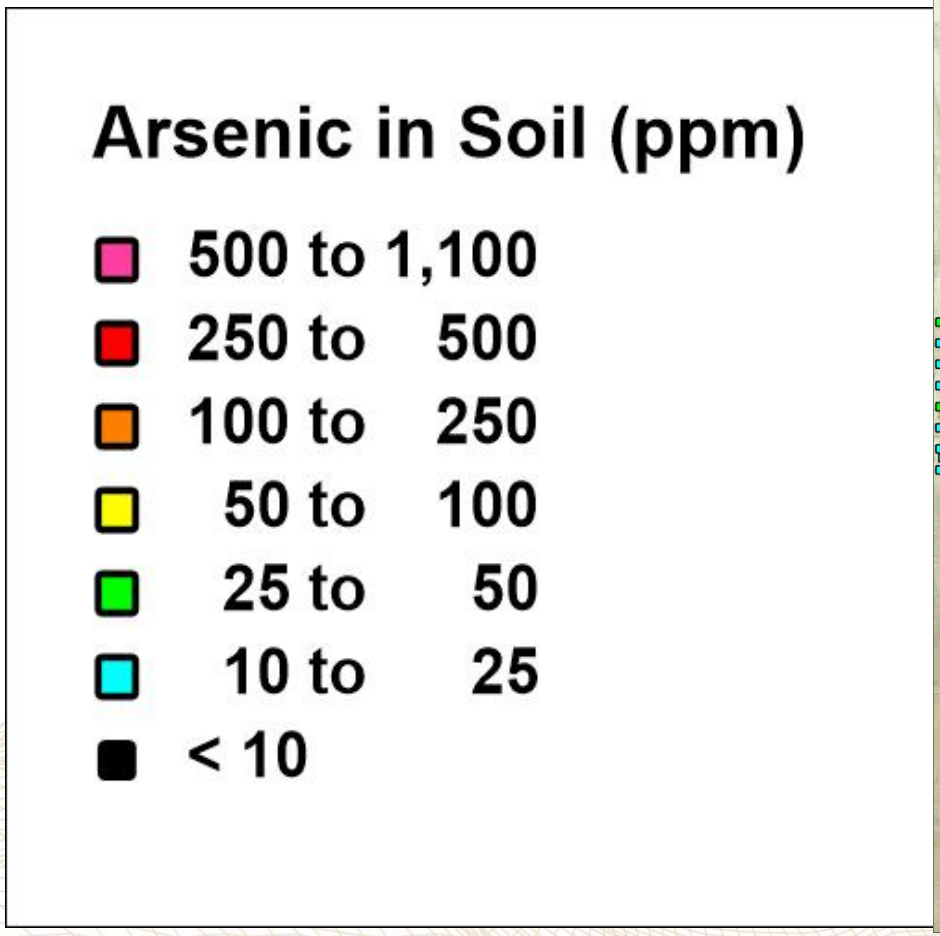
3,000 to	10,000	(16)
1,000 to	3,000	(60)
300 to	1,000	(231)
100 to	300	(456)
30 to	100	(623)
10 to	30	(477)
3 to	10	(199)
< 3		(70)

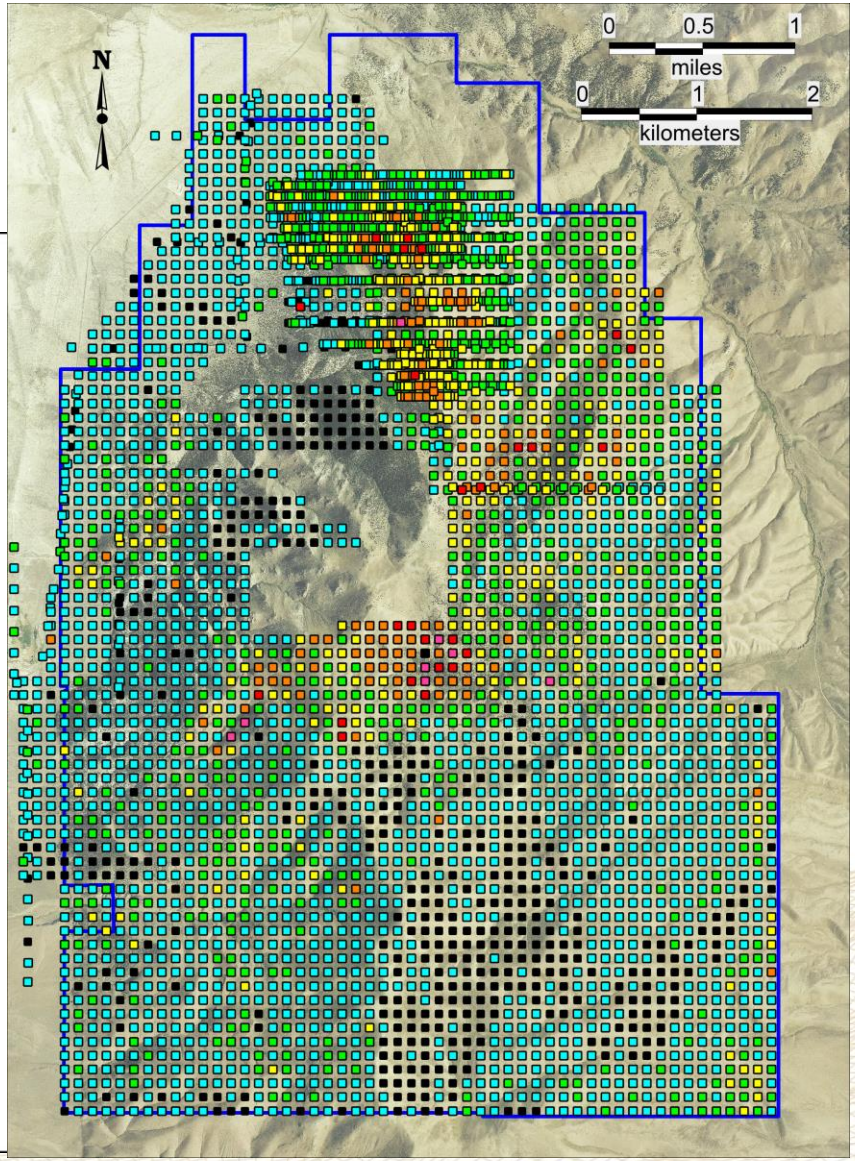


Keystone Geochemistry – Arsenic in Soils

Data as of September, 2017:

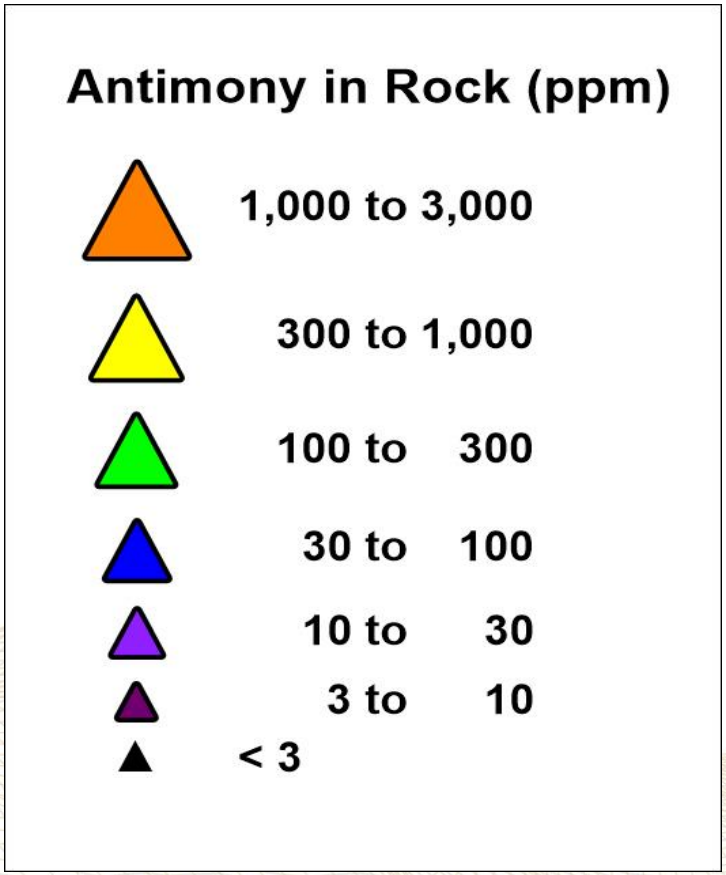
4226 samples

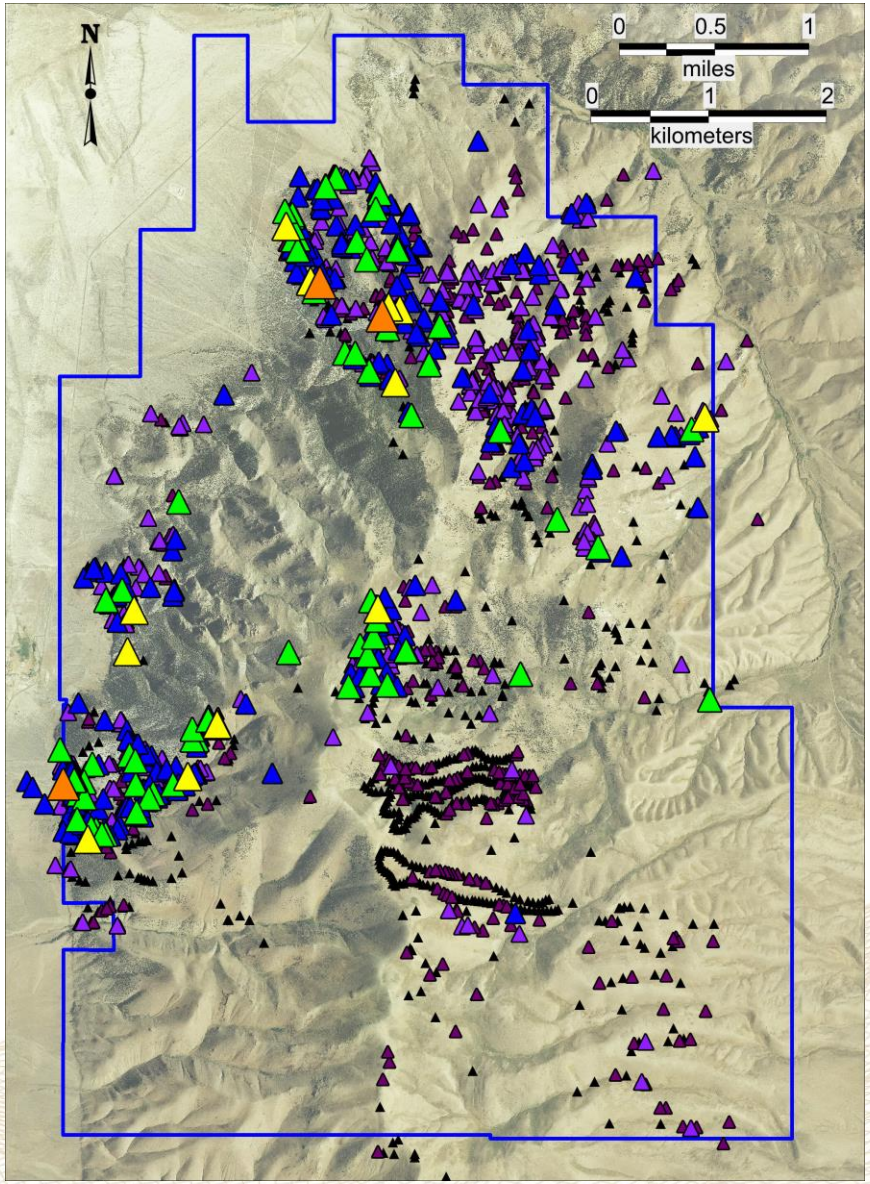




Keystone Geochemistry-Antimony in Rocks

Data as of September, 2017:
2010 samples



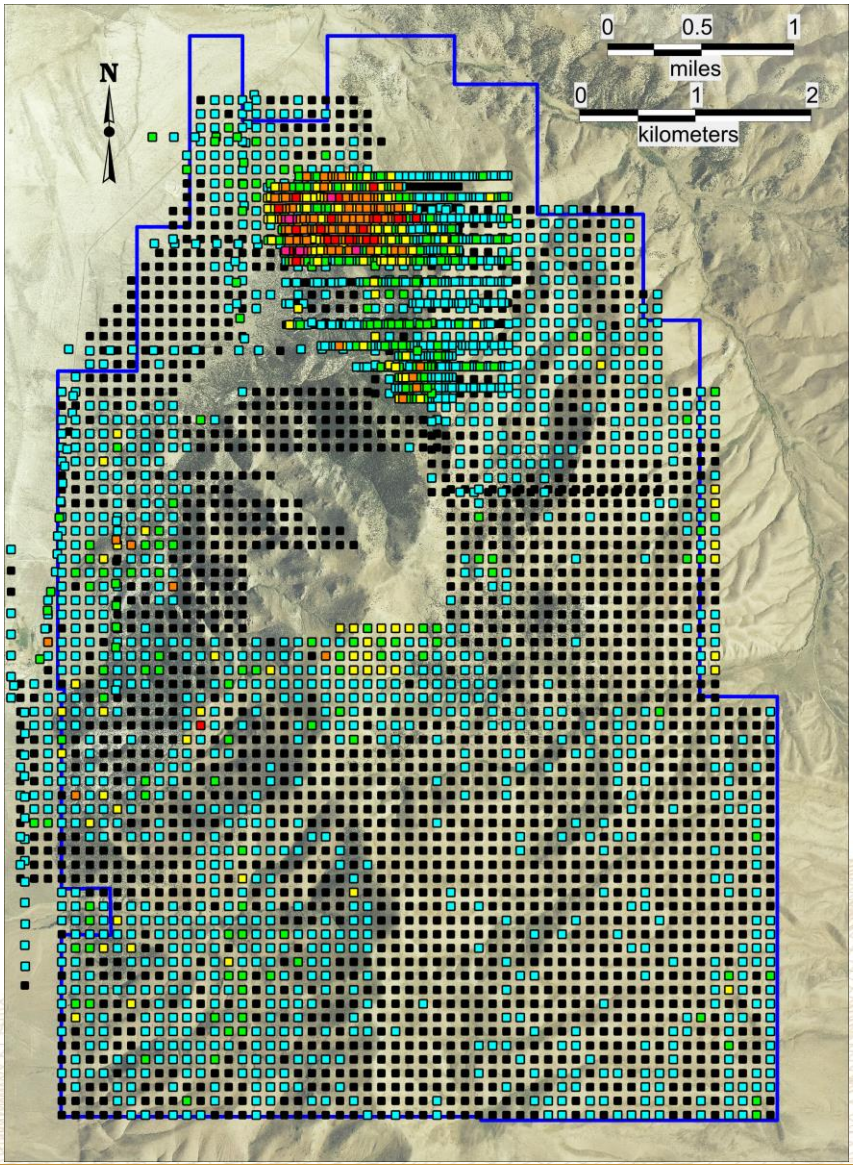


Keystone Geochemistry-Antimony in Soils

Data as of September, 2017:
4226 samples

Antimony in Soil (ppm)

- 100 to 300
- 50 to 100
- 20 to 50
- 10 to 20
- 6 to 10
- 2 to 6
- < 2

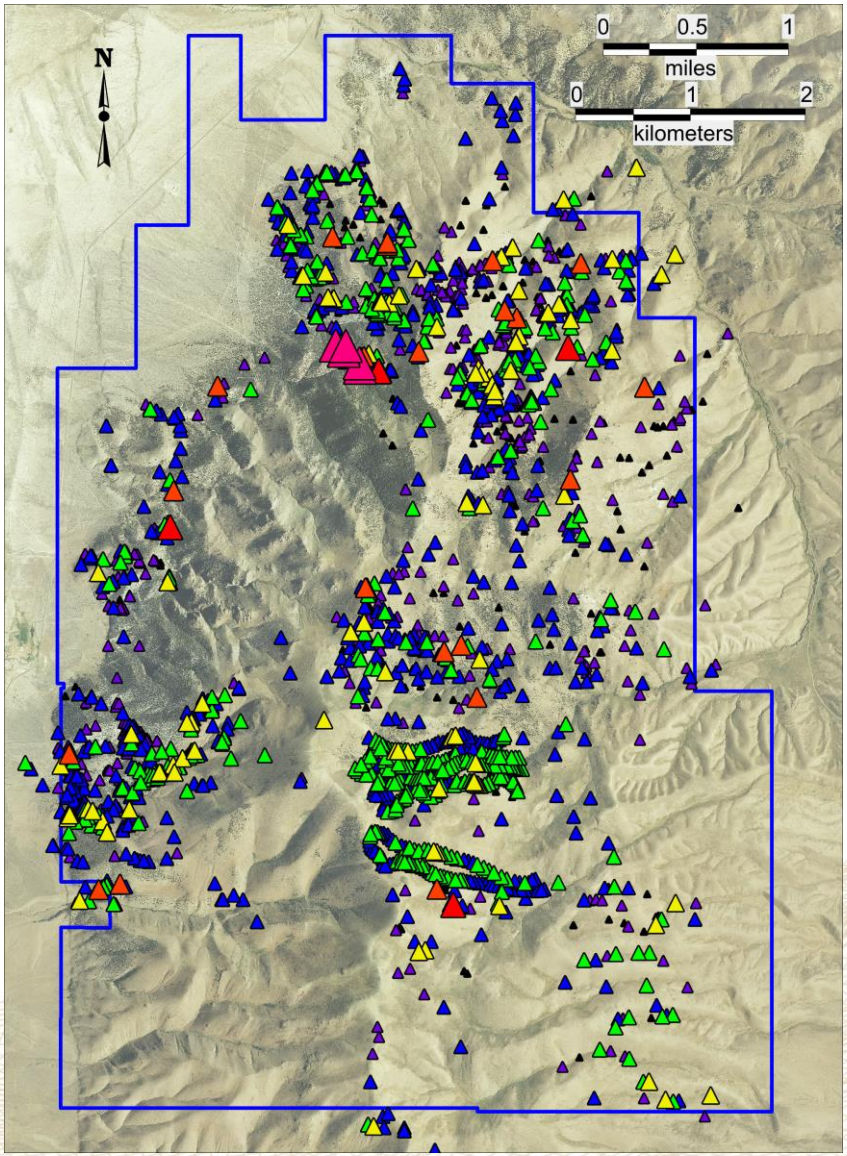


Keystone Geochemistry-Zinc in Rocks

Data as of September, 2017:
2132 samples

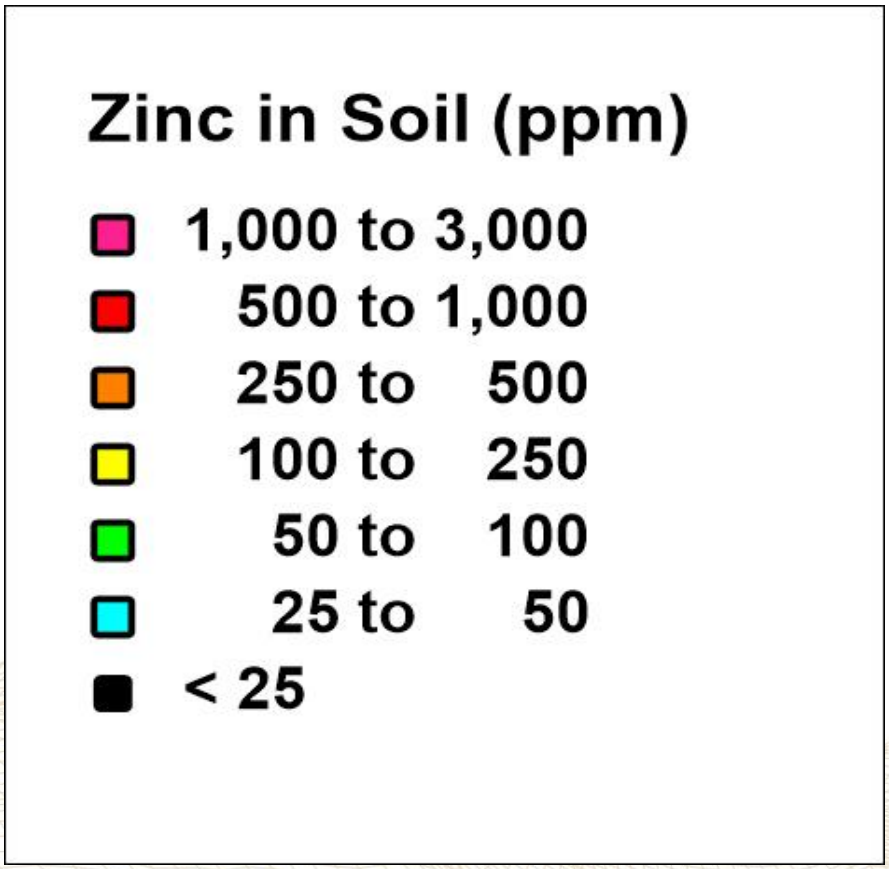
Zinc in Rock (ppm)

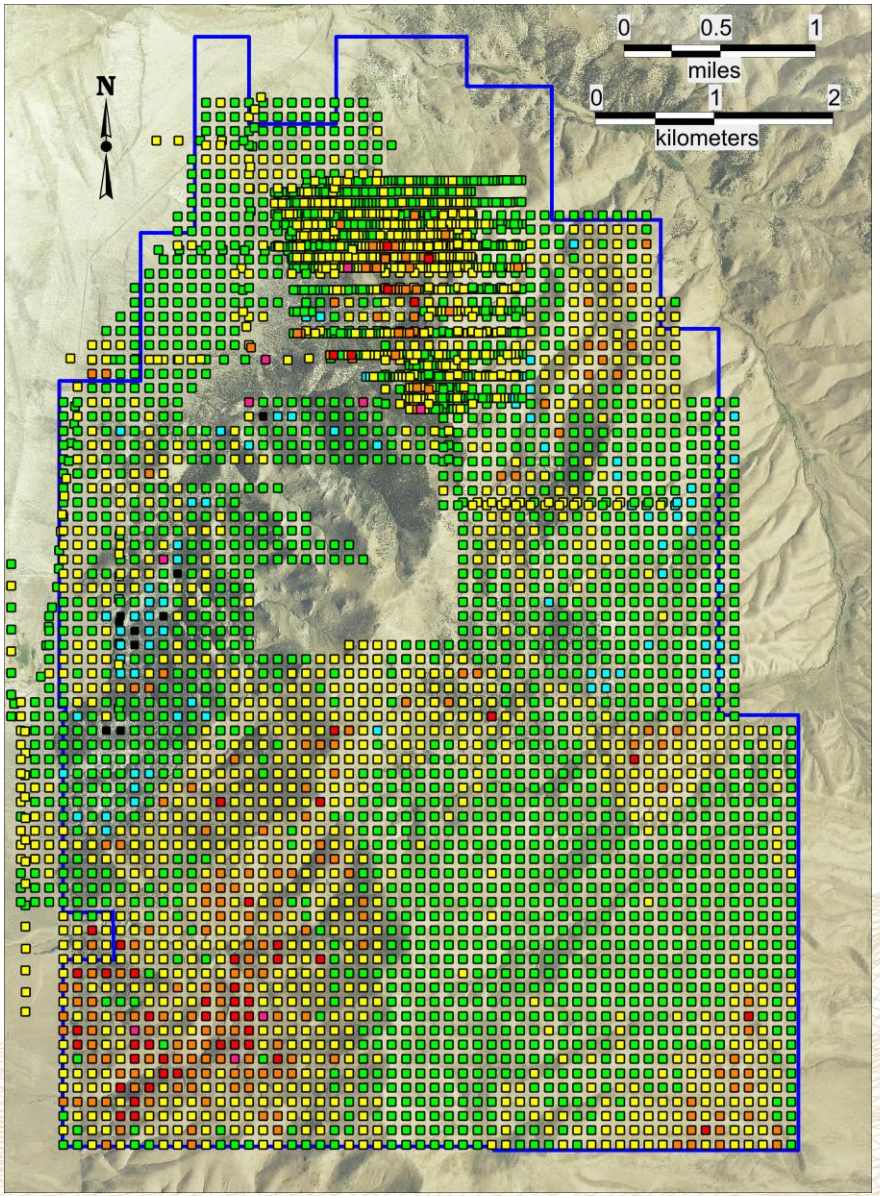
10,000 to 35,000	
3,000 to 10,000	
1,000 to 3,000	
300 to 1,000	
100 to 300	
30 to 100	
10 to 30	
< 10	



Keystone Geochemistry-Zinc in Soils

Data as of September, 2017:
4226 samples





2018 Exploration Program

- EA and POO will cover most of the project and allow widespread, and aggressive drill hole access.

- 2018 drilling will be target specific and based on integration and assessment of all existing data as applied to target concepts.

Conclusion

DEVELOPMENT PACKAGE

Exciting combination of a later stage development asset and exploration blue sky potential

PROVEN TEAM

Top quality management and advisory team with pedigrees of developing renowned gold projects

DEBT FREE

U.S. Gold Corp is debt free; rare in the gold development and exploration space

HIGH UPSIDE

Large growth potential for the current resource and valuation upside based on market comps

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