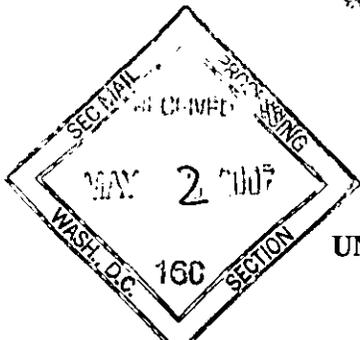


OMB APPROVAL	
OMB Number:	3235-0076
Expires:	April 30, 2008
Estimated Average burden hours per response . . . . .	16.00



**FORM D**  
**NOTICE OF SALE OF SECURITIES**  
**PURSUANT TO REGULATION D,**  
**SECTION 4(6), AND/OR**  
**UNIFORM LIMITED OFFERING EXEMPTION**

866028

SEC USE ONLY	
Prefix	Serial
DATE RECEIVED	

Name of Offering  check if this is an amendment and name has changed, and indicate change.)

Units comprised of Common Shares and Common Share Purchase Warrants

Filing Under (Check box(es) that apply):  Rule 504  Rule 505  Rule 506  Section 4(6)  ULOE  
Type of Filing:  New Filing  Amendment

**A. BASIC IDENTIFICATION DATA**



07054107

1. Enter the information requested about the issuer

Name of Issuer  check if this is an amendment and name has changed, and indicate change.)

**PolyMet Mining Corp.**

Address of Executive Offices <b>1003-1177 West Hastings Street, Vancouver, British Columbia V6E 2K3</b>	(Number and Street, City, State, Zip Code)	Telephone Number (Including Area Code) <b>(609) 669-4701</b>
Address of Principal Business Operations (if different from Executive Offices)	(Number and Street, City, State, Zip Code)	Telephone Number (Including Area Code)

Brief Description of Business

**Mineral exploration**

Type of Business Organization

- corporation  limited partnership, already formed  other (please specify):  
 business trust  limited partnership, to be formed

Actual or Estimated Date of Incorporation or Organization: Month **03** Year **1981**  Actual  Estimated

Jurisdiction of Incorporation or Organization: (Enter two-letter U.S. Postal Service abbreviation for State:

CN for Canada; FN for other foreign jurisdiction CN

**PROCESSED**  
**MAY 16 2007**

**THOMSON FINANCIAL**

**GENERAL INSTRUCTIONS**

**Federal:**

*Who Must File:* All issuers making an offering of securities in reliance on an exemption under Regulation D or Section 4(6), 17 CFR 230.501 et seq. or 15 U.S.C. 77d(6).

*When To File:* A notice must be filed no later than 15 days after the first sale of securities in the offering. A notice is deemed filed with the U.S. Securities and Exchange Commission (SEC) on the earlier of the date it is received by the SEC at the address given below or, if received at that address after the date on which it is due, on the date it was mailed by United States registered or certified mail to that address.

*Where To File:* U.S. Securities and Exchange Commission, 450 Fifth Street, N.W., Washington, D.C. 20549.

*Copies Required:* **Five (5) copies** of this notice must be filed with the SEC, one of which must be manually signed. Any copies not manually signed must be photocopies of the manually signed copy or bear typed or printed signatures.

*Information Required:* A new filing must contain all information requested. Amendments need only report the name of the issuer and offering, any changes thereto, the information requested in Part C, and any material changes from the information previously supplied in Parts A and B. Part E and the Appendix need not be filed with the SEC.

*Filing Fee:* There is no federal filing fee.

**State:**

This notice shall be used to indicate reliance on the Uniform Limited Offering Exemption (ULOE) for sales of securities in those states that have adopted ULOE and that have adopted this form. Issuers relying on ULOE must file a separate notice with the Securities Administrator in each state where sales are to be, or have been made. If a state requires the payment of a fee as a precondition to the claim for the exemption, a fee in the proper amount shall accompany this form. This notice shall be filed in the appropriate states in accordance with state law. The Appendix to the notice constitutes a part of this notice and must be completed.

**ATTENTION**

**Failure to file notice in the appropriate states will not result in a loss of the federal exemption. Conversely, failure to file the appropriate federal notice will not result in a loss of an available state exemption unless such exemption is predicated on the filing of a federal notice.**

Persons who respond to the collection of information contained in this form are not required to respond unless the form displays a currently valid OMB control number.

**A. BASIC IDENTIFICATION DATA**

2. Enter the information requested for the following:

- Each promoter of the issuer, if the issuer has been organized within the past five years;
- Each beneficial owner having the power to vote or dispose, or direct the vote or disposition of, 10% or more of a class of equity securities of the issuer.
- Each executive officer and director of corporate issuers and of corporate general and managing partners of partnership issuers; and
- Each general and managing partner of partnership issuers.

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

**Murray, William**

Business or Residence Address (Number and Street, City, State, Zip Code)

**1003-1177 West Hastings Street Vancouver, British Columbia V6E 2K3**

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

**Forrest, W. Ian L.**

Business or Residence Address (Number and Street, City, State, Zip Code)

**1003-1177 West Hastings Street, Vancouver, British Columbia V6E 2K3**

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

**Dreisinger, David**

Business or Residence Address (Number and Street, City, State, Zip Code)

**1003-1177 West Hastings Street, Vancouver, British Columbia V6E 2K3**

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

**Molyviatis, George**

Business or Residence Address (Number and Street, City, State, Zip Code)

**1003-1177 West Hastings Street, Vancouver, British Columbia V6E 2K3**

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

**Swearingen, James**

Business or Residence Address (Number and Street, City, State, Zip Code)

**1003-1177 West Hastings Street, Vancouver, British Columbia V6E 2K3**

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

**Moore, Niall**

Business or Residence Address (Number and Street, City, State, Zip Code)

**1003-1177 West Hastings Street, Vancouver, British Columbia V6E 2K3**

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

**Newby, Douglas J.**

Business or Residence Address (Number and Street, City, State, Zip Code)

**1003-1177 West Hastings Street, Vancouver, British Columbia V6E 2K3**

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

**Hudelson, Warren**

Business or Residence Address (Number and Street, City, State, Zip Code)

**1003-1177 West Hastings Street, Vancouver, British Columbia V6E 2K3**

(Use blank sheet, or copy and use additional copies of this sheet, as necessary)

**A. BASIC IDENTIFICATION DATA**

3. Enter the information requested for the following:

- Each promoter of the issuer, if the issuer has been organized within the past five years;
- Each beneficial owner having the power to vote or dispose, or direct the vote or disposition of, 10% or more of a class of equity securities of the issuer.
- Each executive officer and director of corporate issuers and of corporate general and managing partners of partnership issuers; and
- Each general and managing partner of partnership issuers.

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)  
**Reymenants, Gaston**

Business or Residence Address (Number and Street, City, State, Zip Code)  
**1003-1177 West Hastings Street Vancouver, British Columbia V6E 2K3**

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

Business or Residence Address (Number and Street, City, State, Zip Code)

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

Business or Residence Address (Number and Street, City, State, Zip Code)

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

Business or Residence Address (Number and Street, City, State, Zip Code)

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

Business or Residence Address (Number and Street, City, State, Zip Code)

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

Business or Residence Address (Number and Street, City, State, Zip Code)

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

Business or Residence Address (Number and Street, City, State, Zip Code)

Check Box(es) that Apply:     Promoter     Beneficial Owner     Executive Officer     Director     General and/or Managing Partner

Full Name (Last name first, if individual)

Business or Residence Address (Number and Street, City, State, Zip Code)

(Use blank sheet, or copy and use additional copies of this sheet, as necessary)

1. Has the issuer sold, or does the issuer intend to sell, to non-accredited investors in this offering? ..... Yes  No   
 Answer also in Appendix, Column 2, if filing under ULOE.
2. What is the minimum investment that will be accepted from any individual? ..... \$N/A
3. Does the offering permit joint ownership of a single unit? ..... Yes  No
4. Enter the information requested for each person who has been or will be paid or given, directly or indirectly, any commission or similar remuneration for solicitation of purchasers in connection with sales of securities in the offering. If a person to be listed is an associated person or agent of a broker or dealer registered with the SEC and/or with a state or states, list the name of the broker or dealer. If more than five (5) persons to be listed are associated persons of such a broker or dealer, you may set forth the information for that broker or dealer only.

Full Name (Last name first, if individual) **Bank Julius Baer & Co., Ltd.**

Business or Residence Address (Number and Street, City, State, Zip Code)

**Bahnhofstrasse 36, P.O. Box CH-8010 Zurich**

Name of Associated Broker or Dealer

States in Which Person Listed Has Solicited or Intends to Solicit Purchasers

(Check "All States" or check individual States) .....  All States

AL	AK	AZ	AR	CA	CO	CT	DE	DC	FL	GA	HI	ID
IL	IN	IA	KS	KY	LA	ME	MD	MA	MI	MN	MS	MO
MT	NE	NV	NH	NJ	NM	NY	NC	ND	OH	OK	OR	PA
RI	SC	SD	TN	TX	UT	VT	VA	WA	WV	WI	WY	PR

Full Name (Last name first, if individual) **Lantern Investments, Inc.<sup>1</sup>**

Business or Residence Address (Number and Street, City, State, Zip Code)

**150 Broadway, Suite 502, New York, NY 10038**

Name of Associated Broker or Dealer

States in Which Person Listed Has Solicited or Intends to Solicit Purchasers

(Check "All States" or check individual States) .....  All States

AL	AK	AZ	AR	X CA	CO	CT	DE	DC	X FL	GA	HI	ID
X IL	IN	IA	KS	KY	LA	ME	MD	X MA	MI	X MN	MS	MO
MT	NE	NV	NH	NJ	NM	X NY	NC	ND	OH	OK	OR	X PA
RI	SC	SD	TN	TX	UT	VT	X VA	WA	WV	X WI	WY	PR

Full Name (Last name first, if individual) **Casimir Capital L.P.<sup>1</sup>**

Business or Residence Address (Number and Street, City, State, Zip Code)

**489 Fifth Avenue, Second Floor, New York, NY 10017**

Name of Associated Broker or Dealer

States in Which Person Listed Has Solicited or Intends to Solicit Purchasers

(Check "All States" or check individual States) .....  All States

AL	AK	AZ	AR	X CA	CO	CT	DE	DC	X FL	GA	HI	ID
X IL	IN	IA	KS	KY	LA	ME	MD	X MA	MI	X MN	MS	X MO
MT	NE	NV	NH	NJ	NM	X NY	NC	ND	OH	OK	OR	X PA
RI	SC	SD	TN	TX	UT	VT	X VA	WA	WV	X WI	WY	PR

1. Has the issuer sold, or does the issuer intend to sell, to non-accredited investors in this offering? ..... Yes  No   
 Answer also in Appendix, Column 2, if filing under ULOE.
2. What is the minimum investment that will be accepted from any individual? ..... \$N/A
3. Does the offering permit joint ownership of a single unit? ..... Yes  No
4. Enter the information requested for each person who has been or will be paid or given, directly or indirectly, any commission or similar remuneration for solicitation of purchasers in connection with sales of securities in the offering. If a person to be listed is an associated person or agent of a broker or dealer registered with the SEC and/or with a state or states, list the name of the broker or dealer. If more than five (5) persons to be listed are associated persons of such a broker or dealer, you may set forth the information for that broker or dealer only.

Full Name (Last name first, if individual) **Jones Gable & Company Limited**

Business or Residence Address (Number and Street, City, State, Zip Code)

**325-555 Burrard Street, Vancouver, British Columbia V7X1M7**

Name of Associated Broker or Dealer

States in Which Person Listed Has Solicited or Intends to Solicit Purchasers

(Check "All States" or check individual States) .....  All States

AL	AK	AZ	AR	CA	CO	CT	DE	DC	FL	GA	HI	ID
IL	IN	IA	KS	KY	LA	ME	MD	MA	MI	MN	MS	MO
MT	NE	NV	NH	NJ	NM	NY	NC	ND	OH	OK	OR	PA
RI	SC	SD	TN	TX	UT	VT	VA	WA	WV	WI	WY	PR

Full Name (Last name first, if individual)

Business or Residence Address (Number and Street, City, State, Zip Code)

Name of Associated Broker or Dealer

States in Which Person Listed Has Solicited or Intends to Solicit Purchasers

(Check "All States" or check individual States) .....  All States

AL	AK	AZ	AR	CA	CO	CT	DE	DC	FL	GA	HI	ID
IL	IN	IA	KS	KY	LA	ME	MD	MA	MI	MN	MS	MO
MT	NE	NV	NH	NJ	NM	NY	NC	ND	OH	OK	OR	PA
RI	SC	SD	TN	TX	UT	VT	VA	WA	WV	WI	WY	PR

Full Name (Last name first, if individual)

Business or Residence Address (Number and Street, City, State, Zip Code)

Name of Associated Broker or Dealer

States in Which Person Listed Has Solicited or Intends to Solicit Purchasers

(Check "All States" or check individual States) .....  All States

AL	AK	AZ	AR	CA	CO	CT	DE	DC	FL	GA	HI	ID
IL	IN	IA	KS	KY	LA	ME	MD	MA	MI	MN	MS	MO
MT	NE	NV	NH	NJ	NM	NY	NC	ND	OH	OK	OR	PA
RI	SC	SD	TN	TX	UT	VT	VA	WA	WV	WI	WY	PR

<sup>1</sup> The offering of the Issuer's units in the United States was part of a larger offering of units made principally in Canada. Lantern Investments, Inc., Casimir Capital L.P., Jones Gable & Company Limited and Bank Julius Baer & Co. Ltd. were each paid a commission for their services as agents with respect to the offer and sale of the Issuer's units. All solicitations in the U.S. were made by Lantern Investments, Inc. and Casimir Capital L.P.

1. Enter the aggregate offering price of securities included in this offering and the total amount already sold. Enter "0" if the answer is "none" or "zero." If the transaction is an exchange offering, check this box  and indicate in the columns below the amounts of the securities offered for exchange and already exchanged.

Type of Security	Aggregate Offering Price	Amount Already Sold
Debt .....	\$ _____	\$ _____
Equity .....	\$ <u>50,710,002.75<sup>2</sup></u>	\$ <u>18,629,998.75</u>
	<input checked="" type="checkbox"/> Common <input type="checkbox"/> Preferred	
Convertible Securities (including warrants) .....	\$ _____ <sup>3</sup>	\$ _____ <sup>3</sup>
Partnership Interests .....	\$ _____	\$ _____
Other (Specify _____) .....	\$ _____	\$ _____
<b>Total .....</b>	<b>\$ <u>50,710,002.75</u></b>	<b>\$ <u>18,629,998.75</u></b>

Answer also in Appendix, Column 3, if filing under ULOE.

2. Enter the number of accredited and non-accredited investors who have purchased securities in this offering and the aggregate dollar amounts of their purchases. For offerings under Rule 504, indicate the number of persons who have purchased securities and the aggregate dollar amount of their purchases on the total lines. Enter "0" if answer is "none" or "zero."

	Number Investors	Aggregate Dollar Amount of Purchases
Accredited Investors .....	<u>34</u>	\$ <u>18,629,998.75</u>
Non-accredited Investors .....	_____	\$ _____
<b>Total (for filings under Rule 504 only) .....</b>	_____	\$ _____

Answer also in Appendix, Column 4, if filing under ULOE.

3. If this filing is for an offering under Rule 504 or 505, enter the information requested for all securities sold by the issuer, to date, in offerings of the types indicated, in the twelve (12) months prior to the first sale of securities in this offering. Classify securities by type listed in Part C - Question 1.

Type of Offering	Type of Security	Dollar Amount Sold
Rule 505 .....	_____	\$ _____
Regulation A .....	_____	\$ _____
Rule 504 .....	_____	\$ _____
<b>Total .....</b>	_____	\$ _____

4. a. Furnish a statement of all expenses in connection with the issuance and distribution of the securities in this offering. Exclude amounts relating solely to organization expenses of the insurer. The information may be given as subject to future contingencies. If the amount of an expenditure is not known, furnish an estimate and check the box to the left of the estimate.

Transfer Agent's Fees .....	<input type="checkbox"/>	\$ _____
Printing and Engraving Costs .....	<input type="checkbox"/>	\$ _____
Legal Fees .....	<input checked="" type="checkbox"/>	<u>\$10,000.00</u>
Accounting Fees .....	<input type="checkbox"/>	\$ _____
Engineering Fees .....	<input type="checkbox"/>	\$ _____
Sales Commissions (specify finders' fees separately) .....	<input checked="" type="checkbox"/>	\$ <sup>4</sup> _____
Other Expenses (identify) _____ .....	<input type="checkbox"/>	\$ _____
<b>Total .....</b>	<input checked="" type="checkbox"/>	<b>\$ <u>10,000.00</u></b>

<sup>2</sup> The aggregate offering amount includes an additional US\$32,080,004.00 that may be received upon exercise of the common share purchase warrants to receive additional common shares sold both inside and outside the United States.

<sup>3</sup> One half of one common share purchase warrant is included in the purchase price of each unit. Each unit consists of one common share and one half of one common share purchase warrant. Each whole common share purchase warrant may be exercised until October 13, 2008 for one common share at an exercise price of US\$4.00 per common share.

<sup>4</sup> The agents received 495,000 agent warrants with respect to the U.S. portion of the offering. Each agent warrant is exercisable for one common share at a price of US\$4.00 per agent warrant until October 13, 2008.

**C. OFFERING PRICE, NUMBER OF NOTES/OBRS, EXPENSES AND USE OF PROCEEDS**

b. Enter the difference between the aggregate offering price given in response to Part C – Question 1 and total expenses furnished in response to Part C – Question 4.a. This difference is the “adjusted gross proceeds to the issuer.” .....

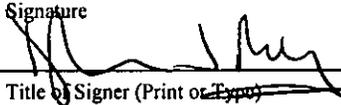
**\$50,700,002.75**

5. Indicate below the amount of the adjusted gross proceed to the issuer used or proposed to be used for each of the purposes shown. If the amount for any purpose is not known, furnish an estimate and check the box to the left of the estimate. The total of the payments listed must equal the adjusted gross proceeds to the issuer set forth in response to Part C – Question 4.b above.

	Payments to Officers, Directors & Affiliates		Payments to Others	
Salaries and fees .....	<input type="checkbox"/>	\$ _____	<input type="checkbox"/>	\$ _____
Purchase of real estate .....	<input type="checkbox"/>	\$ _____	<input type="checkbox"/>	\$ _____
Purchase, rental or leasing and installation of machinery and equipment.....	<input type="checkbox"/>	\$ _____	<input type="checkbox"/>	\$ _____
Construction or leasing of plant buildings and facilities	<input type="checkbox"/>	\$ _____	<input type="checkbox"/>	\$ _____
Acquisition of other businesses (including the value of securities involved in this offering that may be used in exchange for the assets or securities of another issuer pursuant to a merger) .....	<input type="checkbox"/>	\$ _____	<input type="checkbox"/>	\$ _____
Repayment of indebtedness.....	<input type="checkbox"/>	\$ _____	<input type="checkbox"/>	\$ _____
Working capital.....	<input type="checkbox"/>	\$ _____	<input checked="" type="checkbox"/>	<b><u>\$50,700,002.75</u></b>
Other (specify) _____				
.....	<input type="checkbox"/>	\$ _____	<input type="checkbox"/>	\$ _____
.....	<input type="checkbox"/>	\$ _____	<input type="checkbox"/>	\$ _____
Column Totals .....	<input type="checkbox"/>	\$ _____	<input checked="" type="checkbox"/>	<b><u>\$50,700,002.75</u></b>
Total Payments Listed (column totals added) .....			<input checked="" type="checkbox"/>	<b><u>\$50,700,002.75</u></b>

**D. FEDERAL SIGNATURE**

The issuer has duly caused this notice to be signed by the undersigned duly authorized person. If this notice is filed under Rule 505, the following signature constitutes an undertaking by the issuer to furnish to the U.S. Securities and Exchange Commission, upon written request of its staff, the information furnished by the issuer to any non-accredited investor pursuant to paragraph (b)(2) of Rule 502.

Issuer (Print of Type) <b>Polymet Mining Corp.</b>	Signature 	Date April <u>30</u> , 2007
Name of Signer (Print or Type) <b>Douglas J. Newby</b>	Title of Signer (Print or Type) <b>Chief Financial Officer</b>	

**ATTENTION**

**Intentional misstatements or omissions of fact constitute federal criminal violations. (See 18 U.S.C. 1001.)**

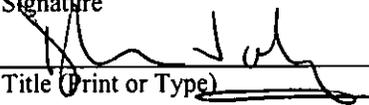
**E. STATE SIGNATURE**

1. ~~Is any party described in 17 CFR 230.262 presently subject to any of the disqualification provision of such rule?~~ Yes  No

See Appendix, Column 5, for state response.

2. The undersigned issuer hereby undertakes to furnish to any state administrator of any state in which this notice is filed a notice on Form D (17 CFR 239.500) at such times as required by state law.
3. ~~The undersigned issuer hereby undertakes to furnish to the state administrators, upon written request, information furnished by the issuer to offerees.~~
4. ~~The undersigned issuer represents that the issuer is familiar with the conditions that must be satisfied to be entitled to the Uniform limited Offering Exemption (ULOE) of the state in which this notice is filed and understands that the issuer claiming the availability of this exemption has the burden of establishing that these conditions have been satisfied.~~

The issuer has read this notification and knows the contents to be true and has duly caused this notice to be signed on its behalf by the undersigned duly authorized person.

Issuer (Print or Type) Polymet Mining Corp.	Signature 	Date April 30, 2007
Name (Print or Type) Douglas J. Newby	Title (Print or Type) Chief Financial Officer	

**Instruction:**

Print the name and title of the signing representative under his signature for the state portion of this form. One copy of every notice on Form D must be manually signed. Any copies not manually signed must be photocopies of the manually signed copy or bear typed or printed signatures.

**APPENDIX**

1 State	2 Intend to sell to non-accredited investors in State (Part B-Item 1)		3 Type of security and aggregate offering price offered in state (Part C-Item 1)	4 Type of investor and amount purchased in State (Part C-Item 2)			5 Disqualification under State ULOE (if yes, attach explanation of waiver granted) (Part E-Item 1)		
	Yes	No		Number of Accredited Investor	Amount	Number of Non-Accredited Investors	Amount	Yes	No
AL		XX							
AK		XX							
AZ		XX							
AR		XX							
CA		XX	Common Shares and Common Share Purchase Warrants \$33,982,503.50	2	\$33,982,503.50				
CO		XX							
CT		XX							
DE		XX							
DC		XX							
FL		XX							
GA		XX							
HI		XX							
ID		XX							
IL		XX							
IN		XX							
IA		XX							
KS		XX							
KY		XX							
LA		XX							
ME		XX							
MD		XX							
MA		XX	Common Shares and Common Share Purchase Warrants \$32,121,254	1	\$32,121,254				
MI		XX							
MN		XX							
MS		XX							

**APPENDIX**

1 State	2 Intend to sell to non-accredited investors in State (Part B-Item 1)		3 Type of security and aggregate offering price offered in state (Part C-Item 1)	4 Type of investor and amount purchased in State (Part C-Item 2)				5 Disqualification under State ULOE (if yes, attach explanation of waiver granted) (Part E-Item 1)	
	Yes	No		Number of Accredited Investor	Amount	Number of Non-Accredited Investors	Amount	Yes	No
MO		XX							
MT		XX							
NE		XX							
NV		XX							
NH		XX							
NJ		XX							
NM		XX							
NY		XX							
NC		XX							
ND		XX							
OH		XX							
OK		XX							
OR		XX							
PA		XX							
RI		XX							
SC		XX							
SD		XX							
TN		XX							
TX		XX							
UT		XX							
VT		XX							
VA		XX	Common Shares and Common Share Purchase Warrants \$32,355,004.00	1	\$32,355,004.00				
WA		XX							
WV		XX							
WI		XX	Common Shares and Common Share Purchase Warrants \$98,355,004.00	4	\$98,355,004.00				

**APPENDIX**

1	2		3	4				5	
	Intend to sell to non-accredited investors in State (Part B-Item 1)			Type of security and aggregate offering price offered in state (Part C-Item 1)	Type of investor and amount purchased in State (Part C-Item 2)				Disqualification under State ULOE (if yes, attach explanation of waiver granted) (Part E-Item 1)
State	Yes	No		Number of Accredited Investor	Amount	Number of Non-Accredited Investors	Amount	Yes	No
WY		XX							
PR		XX							

*END*