

## 4 “BEST OF BREED” MINING GEOLOGISTS. FOLLOW THEIR WORK TO GROW YOUR PORTFOLIO - BIG TIME!

By David H. Smith

In any field of endeavour, a few individuals rise to the point of being head and shoulders above other practitioners of their craft, via confirmation over time of a continuity in the successful application of their skill set(s). Sometimes with results that may “shock” a prepared investor’s portfolio and drive it into an altered state of over-performance.



Gold Pour, 100 oz. Doře Bar

In the field of resource sector work, a study of and an understanding about these overachievers offers a metaphorical “gold mine” of

information upon which to help base actionable decisions with the power to literally change an investor’s financial destiny.

What follows are four resource sector geologists who - in my view - have proven beyond a reasonable doubt that they have the drive, focus, endurance and skills to come up with results having the potential to be nothing less than extraordinary. They do not rest on their laurels, but rather strive to continually refine the craft and expand their reach in applying newly-advanced methodologies. Each has reached the level where they are able - often using the same tools and evidence

others have employed - yet seeing what others have not seen, to make that big discovery. Their internal Rosetta Stone enables them to crack the success code - time after time!

At some point, investment and risk money is drawn to these efforts. Colleagues, and the more perceptive members of the retail community sense that what they’ve accomplished so far is not just a one (or two) off wonder. Overall, they have become - along with an occasional miss - serially successful.

The series that follows is not meant to suggest a particular hierarchy. Any one of these overachievers could have been placed “first”.

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**Bill Sheriff** - During the last Uranium bull run, Sheriff founded Energy Metals with a \$1 million market cap and sold it a few years later for US\$1.5b. He founded Golden Predator Mining and as Executive Chair of enCore Energy, acquired 40% of privately-held Group 11 Technologies, a company “committed to testing and implementing the non-invasive extraction technologies (ISR) of precious metals.” At the Top in 2011, there were 600 uranium sector stocks. As of late 2020, about 4 dozen have been left standing.

**Dr. Peter Megaw** - Dr. Megaw is the world’s foremost exponent in the concept, exploration for and development of Carbonate Replacement mineralization Deposits (CRDs). These are defined as “ore bodies of metallic minerals formed by the replacement of sedimentary carbonate rock, by metal-bearing solutions in the vicinity of igneous intrusions.” They are very large mineral rich deposits. Dr. Megaw’s company, in concert with Mexico’s Fresnillo, will become one of the world’s largest primary silver producers when it begins production in December. He continues to facilitate the search and discovery of new CRDs in various locales, most recently in Utah.

**Dr. Keith Barron** - As the founder and CEO of Aurelian Resources, Dr. Barron - nicknamed the “Indiana Jones of Mining” - spearheaded the discovery in 2006 of Fruta del Norte, one of the largest gold discoveries of the last quarter century. Two years later it was sold to Kinross Gold for \$1.2 billion. He is now in the process of delineating a potentially massive copper deposit with values rich enough that it may not need to be shipped to a smelter for processing. Not to mention concurrently zeroing in through the jungle on two “lost cities” described in Conquistador history as having the richest in gold and silver values in the Spanish empire. In the search, his team uses LIDAR (light in the form of pulsed laser to measure variable distances to the earth) to penetrate dense jungle foliage, in concert with high-density stream sampling in the search for “pathfinder metals” that can indicate the presence of commercially-viable values of gold, silver and copper.

**Dr. Quinton Hennigh** - Dr. Hennigh has almost three decades of exploration

experience, with a gold-related focus. After listening to several interviews, it seems to this writer that he is ultimately after “big new or underappreciated discoveries.” In the service of achieving this, he is represented in disparate areas of the globe on projects that have certain commonalities, yet also important unique features. Consider these locales in the following countries: Gold exploration and company co-founder, soon to be producing at a highly-competitive cost ratio, Western Australia; Director and Technical Advisor; Japan; Technical and Senior Business Advisor, Bolivia; Director, Eastern Canada; Director in an early-stage highly-prospective gold exploration project, Northern B.C.

**Actionable Advice:** Take time to learn about the skill sets, the specific approach to resource exploration and development, and the core focus levers that drive these “best in class” geologists to excel.

For the most part, mention here has included areas of work or skill

on the way toward making actionable decisions on companies that your additional research indicates merit inclusion in an asymmetric growth portfolio. (Within the last 30-45 days, a project to which each is associated has released important, perhaps transformative news.)

When you see that one of these “names” is looking at or involved in a project, ask yourself “Why does this interest him?” “As a company founder, a consultant, board member, or in a ‘hands on’ role with boots on the ground, what does he hope to accomplish by getting involved?”

Don’t mindlessly buy a company because you see that one or more of them is involved. Rather, overlay your own due diligence to advance an understanding of the project to see if getting involved can help the drive to reach your financial goal posts. Determine the “Why?” and you might one day spot a company with a theme-related project that they have yet to uncover. Now wouldn’t that be a coup - for you?



A “paper promise“ vs. Honest Money

specialties, rather than current project names. A modest amount of research can turn up these data points. Learn to spot attributes of the projects to which they’ve chosen to apply their uniquely developed talents.

They have all been interviewed and are posted on YouTube. Making time to peruse and take some notes on these videos offers a wealth of knowledge

**Bio Brief:**

David H. Smith, Senior Analyst for TheMorganReport.com is a contributor to MoneyMetals.com and the LODE Cryptographic Silver Monetary System (CSMS) Project. He investigates mines and exploration sites in Argentina, Chile, Peru, Mexico, Bolivia, China, Canada, the U.S. and shares his research with readers, the media, and investment conference attendees, both F2F and virtual.