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UNITED STATES SECURITIES AND EXCHANGE COMMISSION

Washington, D.C. 20549

FORM D

OMB APPROVAL

OMB Number: 3235-0076
Estimated average burden
hours per response: 4.00

Notice of Exempt Offering of Securities

1. Issuer's Identity

CIK (Filer ID Number)

[0001951089](#)

Name of Issuer

[Critical Metals Corp.](#)

Jurisdiction of Incorporation/Organization

[VIRGIN ISLANDS, BRITISH](#)

Year of Incorporation/Organization

☐ Over Five Years Ago

☒ Within Last Five Years (Specify Year) [2022](#)

☐ Yet to Be Formed

Previous
Names

☐ None

[Critical Metals Ltd](#)

Entity Type

☒ Corporation

☐ Limited Partnership

☐ Limited Liability Company

☐ General Partnership

☐ Business Trust

☐ Other (Specify)

2. Principal Place of Business and Contact Information

Name of Issuer

[Critical Metals Corp.](#)

Street Address 1

[MAPLES CORPORATE SERVICES \(BVI\) LIMITED](#)

Street Address 2

[KINGSTON CHAMBERS, PO BOX 173](#)

City

[ROAD TOWN, TORTOLA](#)

State/Province/Country

[VIRGIN ISLANDS, BRITISH](#)

ZIP/PostalCode

[VG1110](#)

Phone Number of Issuer

[302-636-5400](#)

3. Related Persons

Last Name

[Sage](#)

First Name

[Tony](#)

Middle Name

Street Address 1

[Kingston Chambers,](#)

Street Address 2

[PO Box 173](#)

City

[Road Town, Tortola](#)

State/Province/Country

[VIRGIN ISLANDS, BRITISH](#)

ZIP/PostalCode

[VG1110](#)

Relationship: ☒ Executive Officer ☒ Director ☐ Promoter

Clarification of Response (if Necessary):

Last Name

[Wanke](#)

First Name

[Dietrich](#)

Middle Name

Street Address 1

[Kingston Chambers,](#)

Street Address 2

[PO Box 173](#)

City

[Road Town, Tortola](#)

State/Province/Country

[VIRGIN ISLANDS, BRITISH](#)

ZIP/PostalCode

[VG1110](#)

Relationship: ☒ Executive Officer ☐ Director ☐ Promoter

Clarification of Response (if Necessary):

Last Name

[Parkes](#)

First Name

[Steve](#)

Middle Name

Street Address 1

[Kingston Chambers,](#)

Street Address 2

[PO Box 173](#)

City

[Road Town, Tortola](#)

State/Province/Country

[VIRGIN ISLANDS, BRITISH](#)

ZIP/PostalCode

[VG1110](#)

Relationship: ☒ Executive Officer ☐ Director ☐ Promoter

Clarification of Response (if Necessary):

Last Name	First Name	Middle Name
Day	Malcolm	
Street Address 1	Street Address 2	
Kingston Chambers,	PO Box 173	
City	State/Province/Country	ZIP/PostalCode
Road Town, Tortola	VIRGIN ISLANDS, BRITISH	VG1110
Relationship: ☐ Executive Officer ☒ Director ☐ Promoter		

Clarification of Response (if Necessary):

Last Name	First Name	Middle Name
Hanson	Michael	
Street Address 1	Street Address 2	
Kingston Chambers,	PO Box 173	
City	State/Province/Country	ZIP/PostalCode
Road Town, Tortola	VIRGIN ISLANDS, BRITISH	VG1110
Relationship: ☐ Executive Officer ☒ Director ☐ Promoter		

Clarification of Response (if Necessary):

Last Name	First Name	Middle Name
Zhernov	Mykhailo	
Street Address 1	Street Address 2	
Kingston Chambers,	PO Box 173	
City	State/Province/Country	ZIP/PostalCode
Road Town, Tortola	VIRGIN ISLANDS, BRITISH	VG1110
Relationship: ☐ Executive Officer ☒ Director ☐ Promoter		

Clarification of Response (if Necessary):

4. Industry Group

☐ Agriculture	Health Care	☐ Retailing
Banking & Financial Services	☐ Biotechnology	☐ Restaurants
☐ Commercial Banking	☐ Health Insurance	Technology
☐ Insurance	☐ Hospitals & Physicians	☐ Computers
☐ Investing	☐ Pharmaceuticals	☐ Telecommunications
☐ Investment Banking	☐ Other Health Care	☐ Other Technology
☐ Pooled Investment Fund	☐ Manufacturing	Travel
Is the issuer registered as an investment company under the Investment Company Act of 1940?	Real Estate	☐ Airlines & Airports
☐ Yes ☐ No	☐ Commercial	☐ Lodging & Conventions
☐ Other Banking & Financial Services	☐ Construction	☐ Tourism & Travel Services
☐ Business Services	☐ REITS & Finance	☐ Other Travel
Energy	☐ Residential	☒ Other
☐ Coal Mining	☐ Other Real Estate	
☐ Electric Utilities		
☐ Energy Conservation		
☐ Environmental Services		
☐ Oil & Gas		
☐ Other Energy		

5. Issuer Size

Revenue Range	OR	Aggregate Net Asset Value Range
☐ No Revenues		☐ No Aggregate Net Asset Value
☐ \$1 - \$1,000,000		☐ \$1 - \$5,000,000
☐ \$1,000,001 - \$5,000,000		☐ \$5,000,001 - \$25,000,000
☐ \$5,000,001 - \$25,000,000		☐ \$25,000,001 - \$50,000,000
☐ \$25,000,001 -		☐ \$50,000,001 - \$100,000,000

☐ \$100,000,000	☐
☐ Over \$100,000,000	☐ Over \$100,000,000
☒ Decline to Disclose	☐ Decline to Disclose
☐ Not Applicable	☐ Not Applicable

6. Federal Exemption(s) and Exclusion(s) Claimed (select all that apply)

☐ Rule 504(b)(1) (not (i), (ii) or (iii))	☐ Investment Company Act Section 3(c)	
☐ Rule 504 (b)(1)(i)	☐ Section 3(c)(1)	☐ Section 3(c)(9)
☐ Rule 504 (b)(1)(ii)	☐ Section 3(c)(2)	☐ Section 3(c)(10)
☐ Rule 504 (b)(1)(iii)	☐ Section 3(c)(3)	☐ Section 3(c)(11)
☒ Rule 506(b)	☐ Section 3(c)(4)	☐ Section 3(c)(12)
☐ Rule 506(c)	☐ Section 3(c)(5)	☐ Section 3(c)(13)
☐ Securities Act Section 4(a)(5)	☐ Section 3(c)(6)	☐ Section 3(c)(14)
	☐ Section 3(c)(7)	

7. Type of Filing

☒ New Notice Date of First Sale [2025-02-06](#) ☐ First Sale Yet to Occur

☐ Amendment

8. Duration of Offering

Does the Issuer intend this offering to last more than one year? ☐ Yes ☒ No

9. Type(s) of Securities Offered (select all that apply)

☒ Equity	☐ Pooled Investment Fund Interests
☐ Debt	☐ Tenant-in-Common Securities
☒ Option, Warrant or Other Right to Acquire Another Security	☐ Mineral Property Securities
☐ Security to be Acquired Upon Exercise of Option, Warrant or Other Right to Acquire Security	☐ Other (describe)

10. Business Combination Transaction

Is this offering being made in connection with a business combination transaction, such as a merger, acquisition or exchange offer? ☐ Yes ☒ No

Clarification of Response (if Necessary):

11. Minimum Investment

Minimum investment accepted from any outside investor [\\$75,000](#) USD

12. Sales Compensation

Recipient Jett Capital Advisors, LLC (Associated) Broker or Dealer ☒ None None Street Address 1 712 Fifth Avenue City New York State(s) of Solicitation (select all that apply) Check "All States" or check individual States ☒ All States	Recipient CRD Number ☐ None 000169127 (Associated) Broker or Dealer CRD Number ☒ None None Street Address 2 11th Floor State/Province/Country NEW YORK ☐ Foreign/non-US	ZIP/Postal Code 10019
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Recipient J.V.B. Financial Group, LLC (Associated) Broker or Dealer ☒ None None Street Address 1 3 Columbus Circle City	Recipient CRD Number ☐ None 000149758 (Associated) Broker or Dealer CRD Number ☒ None None Street Address 2 24th Floor State/Province/Country	ZIP/Postal Code
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New YorkNEW YORK10019

State(s) of Solicitation (select all that apply)
Check "All States" or check individual States

☒ All States☐ Foreign/non-US

Recipient

EAS Advisors, LLC, through Odeon Capital Group LLC

(Associated) Broker or Dealer

None

Reciprocal CRD Number

000148493

(Associated) Broker or Dealer CRD Number

None

Street Address 1

750 Lexington Avenue

City

New York

State(s) of Solicitation (select all that apply)
Check "All States" or check individual States

☒ All States☐ Foreign/non-US

Street Address 2

27th Floor

State/Province/Country

NEW YORK

ZIP/Postal Code

10022

13. Offering and Sales Amounts

Total Offering Amount

\$24,550,000 USD

or

☐ Indefinite

Total Amount Sold

\$24,550,000 USD

Total Remaining to be Sold

\$0 USD

or

☐ Indefinite

Clarification of Response (if Necessary):

14. Investors

☐ Select if securities in the offering have been or may be sold to persons who do not qualify as accredited investors, and enter the number of such non-accredited investors who already have invested in the offering.

Regardless of whether securities in the offering have been or may be sold to persons who do not qualify as accredited investors, enter the total number of investors who already have invested in the offering:

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15. Sales Commissions & Finder's Fees Expenses

Provide separately the amounts of sales commissions and finders fees expenses, if any. If the amount of an expenditure is not known, provide an estimate and check the box next to the amount.

Sales Commissions

\$1,473,000 USD

☐ Estimate

Finders' Fees

\$0 USD

☐ Estimate

Clarification of Response (if Necessary):

Total sales commission included \$1,473,000 in cash (listed above) as well as Warrants to purchase Ordinary Shares of Critical Metals Corp. worth \$1,473,000.

16. Use of Proceeds

Provide the amount of the gross proceeds of the offering that has been or is proposed to be used for payments to any of the persons required to be named as executive officers, directors or promoters in response to Item 3 above. If the amount is unknown, provide an estimate and check the box next to the amount.

\$0 USD

☐ Estimate

Clarification of Response (if Necessary):

Signature and Submission

Please verify the information you have entered and review the Terms of Submission below before signing and clicking SUBMIT below to file this notice.

Terms of Submission

In submitting this notice, each issuer named above is:

- Notifying the SEC and/or each State in which this notice is filed of the offering of securities described and undertaking to furnish them, upon written request, in the accordance with applicable law, the information furnished to offerees.*
- Irrevocably appointing each of the Secretary of the SEC and, the Securities Administrator or other legally designated officer of the State in which the issuer maintains its principal place of business and any State in which this notice is filed, as its agents for service of process, and agreeing that these persons may accept service on its behalf, of any notice, process or pleading, and further agreeing that such service may be made by registered or certified mail, in any Federal or state action, administrative proceeding, or arbitration brought against the issuer in any place subject to the jurisdiction of the United States, if the action, proceeding or arbitration (a) arises out of any activity in connection with the offering of securities that is the subject of this notice, and (b) is founded, directly or indirectly, upon the provisions of: (i) the Securities Act of 1933, the Securities Exchange Act of 1934, the Trust Indenture Act of 1939, the Investment Company Act of 1940, or the Investment Advisers Act of 1940, or any rule or regulation under any of these statutes, or (ii) the laws of the State in which the issuer maintains its principal place of business or any State in which this notice is filed.

- Certifying that, if the issuer is claiming a Regulation D exemption for the offering, the issuer is not disqualified from relying on Rule 504 or Rule 506 for one of the reasons stated in Rule 504(b)(3) or Rule 506(d).

Each Issuer identified above has read this notice, knows the contents to be true, and has duly caused this notice to be signed on its behalf by the undersigned duly authorized person.

For signature, type in the signer's name or other letters or characters adopted or authorized as the signer's signature.

Issuer	Signature	Name of Signer	Title	Date
Critical Metals Corp.	/s/ Tony Sage	Tony Sage	Executive Chairman	2025-02-21

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 number.

* This undertaking does not affect any limits Section 102(a) of the National Securities Markets Improvement Act of 1996 ("NSMIA") [Pub. L. No. 104-290, 110 Stat. 3416 (Oct. 11, 1996)] imposes on the ability of States to require information. As a result, if the securities that are the subject of this Form D are "covered securities" for purposes of NSMIA, whether in all instances or due to the nature of the offering that is the subject of this Form D, States cannot routinely require offering materials under this undertaking or otherwise and can require offering materials only to the extent NSMIA permits them to do so under NSMIA's preservation of their anti-fraud authority.