

Managing the Cap Table

Core Learning Lab

July 2026

Upcoming Events

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● Learning Lab

2. Preparing to Issue Equity

■ PART 2 OF 3

Aug 5, 2026
12 PM – 1 PM SGT

Register →

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● Learning Lab

3. Managing your Fundraise 101

■ PART 3 OF 3

Sep 2, 2026
12 PM – 1 PM SGT

Register →

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- Customer chats
- Register for future **Learning Labs**

carta Community

Q Search

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Tackle your equity, fundraising, and fund administration challenges— together.

Join Carta Community to connect with peers who use Carta like you do.

[Join the Community](#)



LIVE EVENTS

FIELD GUIDES

LEARNING PATHS

HOW TO VIDEOS

Welcome to Carta Learning

Self-paced learning resources aligned with **key company milestones**.

- Earn 50 points for each learning path course completed
- Complete all 'learning paths' and earn a Fully Vested Carta Admin badge

Start your learning path

How-to video library

Explore our field guides

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Meet the speaker

Eielson Low
Customer Success Manager
2 years at Carta



Managing the Cap Table

Core Learning Lab

Part 1 of 3

This session covers the core concepts behind **venture company** cap table management.

Starting with permissions and reporting, all the way to stakeholder management. We'll focus on *how* to think about basic cap table actions.

■ Jul 2026

How do I update
my cap table?

What is the first
step..?

What happens
next after..?

What if I make a
mistake?



I should just pay
someone else
to do this...

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Key Company Settings

Streamlined cap table management starts with access.

SETTING	WHY IT MATTERS	RESOURCES
User permissions & roles	Individuals who will manage the company's cap table	<ul style="list-style-type: none">• Permission sets• Signatories• Company contacts• Law firms/Outsourced firms
Cap Table Access	Investors and key stakeholders can access what they need—without you lifting a finger	<ul style="list-style-type: none">• Cap table access levels• Access requests
HRIS integrations	Allows for automatic syncing of employee data, reducing manual entry and the potential for errors	<ul style="list-style-type: none">• How to integrate your HRIS• Benefits of integration

Cap Table Reports

REPORT NAME	DESCRIPTION
Equity Plan Report	A ledger of all securities granted from the equity plan including reserved and outstanding share counts as well as canceled and returned awards and more
Certification Transaction Report	Detailed transaction history of each certificate
Audit Report	A full audit report of every action taken in your account
Cap Table Report	Capitalization table grouped by organization, individual stakeholder, or security type
Carta Reporting Skill *NEW	Carta Reporting is a skill within the Carta Cap Table plugin that lets you generate, filter, and export Carta equity reports in any MCP-compatible AI client.

Custom Reporting with Claude

Meety option grants 2024

shares at \$1.00 exercise price, 100% vested as of today. Use the Columns panel to toggle fields, or click "Excel export" to download.

ok actually do 2018-2020

Ran a command

12 grants matched. Now updating the artifact.

Edited 2 files, ran a command, loaded tools

Updated artifact: meety-option-grants-2021

12 grants across 4 stakeholders, all 100% vested. Tagg Palmer has the most exposure with 6 grants totaling 54,000 shares issued between December 2018.

✱

Write a message...

Sonnet 4.6

Meety option grants 2021 - HTML

Open in Island

CONFIDENTIAL
Generated by Cody Taylor via Claude AI

OPTIONS OUTSTANDING

Meety, Corporation

Corporation: Meety, Corporation (ID: 7)
As of Date: 2026-06-01
Filter: Issue Date: 2018-2020 - Vested % > 50%

Columns Excel export

Option Grants — 2018-2020 (>50% Vested) 12 rows

Formatted Security ID	Stakeholder Name	Stakeholder Email	Base Award Type	Security Type	Quantity Issued
ES-195	João das neves	joao@carta.com	ISO	EQUITY AWARD	100
ES-196	Joao das Neves	joao@carta.com	ISO	EQUITY AWARD	100
ES-202	Tagg Palmer	tagg@esharesinc.com	NSO	EQUITY AWARD	100
ES-203	Tagg Palmer	tagg@esharesinc.com	NSO	EQUITY AWARD	100
ES-204	Tagg Palmer	tagg@esharesinc.com	ISO	EQUITY AWARD	100
ES-205	Tagg Palmer	tagg@esharesinc.com	ISO	EQUITY AWARD	100
ES-206	Tagg Palmer	tagg@esharesinc.com	ISO	EQUITY AWARD	100
ES-207	Tagg Palmer	tagg@esharesinc.com	ISO	EQUITY AWARD	100
ES-208	Tagg Jones	tagg+1@esharesinc.com	NSO	EQUITY AWARD	100
ES-210	Tagg Jones	tagg+1@esharesinc.com	NSO	EQUITY AWARD	100
ES-211	Tagg Jones	tagg+1@esharesinc.com	ISO	EQUITY AWARD	100
ES-212	JR Quarnberg	demo-ccmx+jr@carta.com	ISO	EQUITY AWARD	100

Data sourced from Carta. Column selection, sorting, and display are Claude-computed best-effort analysis — not official Carta output. Verify financial data independently before relying on this report for legal or tax purposes.

CARTA DATA 2026-06-01

Your Securities Ledger

Your go-to for managing all security details and transactions,

ACTION

RESOURCES

[Transfer securities](#)

Company account users with *Full access* permissions can easily transfer shares and other security types between Carta stakeholders

[Repurchase securities](#)

How to execute a repurchase and select a transaction types

[Manage or edit security details](#)

To update the same information across multiple securities, Full access users can select them on the ledger and use the Actions button. To update the information on an individual security, click its row tools button

[Manage exercises](#)

If you are your company's designated *Option exercise approver*, follow these steps to review submitted online option exercise requests

Your Stakeholder Ledger

Your main hub for managing all stakeholder related details.

ACTION

RESOURCES

[Terminate Employees](#)

If an employee with unvested equity awards is terminated, you'll also need to update their status on the company's stakeholder ledger. This step ensures that they no longer earn unvested shares, and that those shares are returned to the equity pool

[Edit Stakeholder Details](#)

Carta's stakeholder ledger is a powerful tool allowing users with Company editor, HR administrator, or Full access permissions to view info about each stakeholder holding one or more securities on the company cap table

[Merge Stakeholders](#)

Carta's stakeholder ledger allows you to merge stakeholders, consolidating the information tied to two separate stakeholder entries and effectively eliminating duplicates.

Q&A

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