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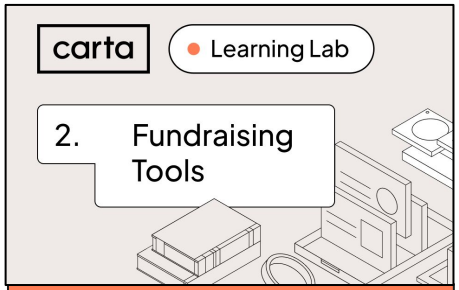
Managing the Cap Table
Core Learning Lab

JULY 2026

PART 1 OF 4

Upcoming Events

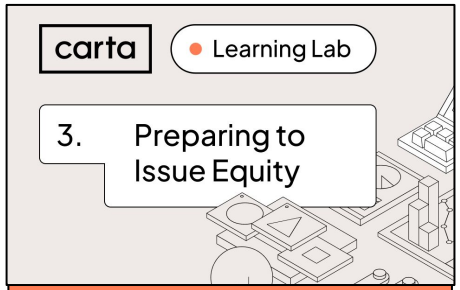
Join live sessions with startup experts, attend product education webinars, and connect with peers facing the same challenges as you.



PART 2 OF 4

Wednesday, Aug 12
10:00 – 11:00 AM PDT

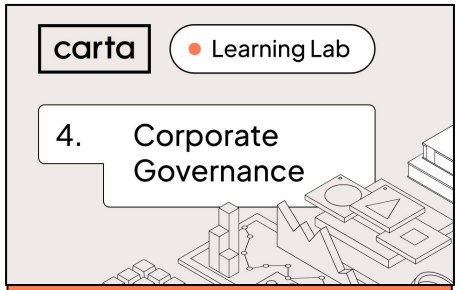
Register →



PART 3 OF 4

Wednesday, Aug 26
12:00 – 1:00 PM PDT

Register →



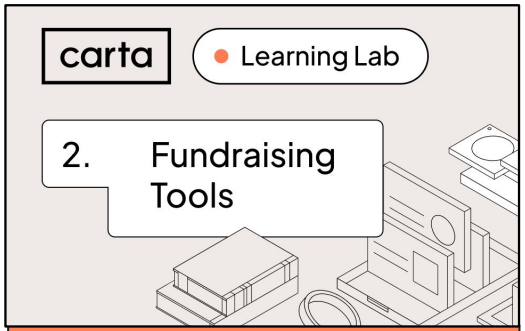
PART 4 OF 4

Jul 9, 2026
10:00 – 11:00 AM PDT

Register →

Upcoming Events

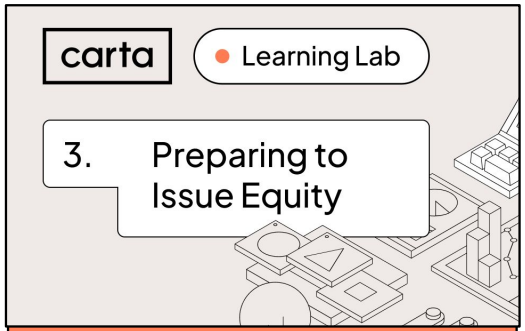
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PART 2 OF 4

Wednesday, Aug 12
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Register →



PART 3 OF 4

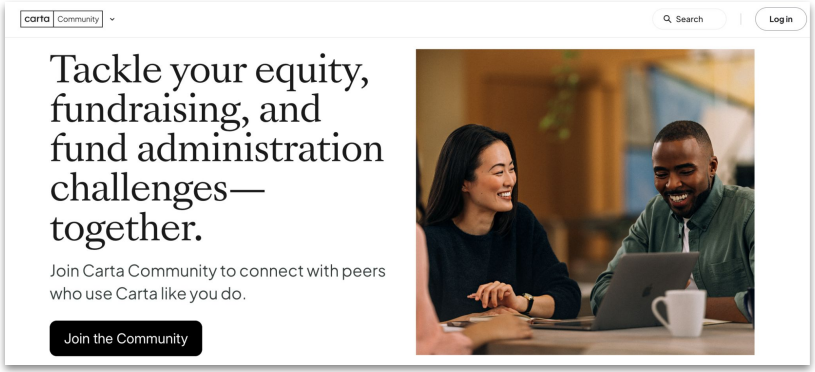
Wednesday, Aug 26
12:00 – 1:00 PM PDT

Register →

Continue the conversation..

Collaborate with peers and industry experts while learning how to make Carta work for you:

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






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Meet the speakers

Brianne Villamor
Customer Enablement Manager
Over 6 years at Carta

I've worked with founders at every stage—from early stage startups all of the way to Series D companies with hundreds of employees—across technical support, sales, and customer success.

Currently, I help our users make the most out of Carta, grounded in a deep understanding of a the private equity space and it's ever-evolving needs.



Managing the Cap Table

Core Learning Lab

Part 1 of 4

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.

MAY 2026

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What is the first step..?

How do I update my cap table?

What happens next after..?



What if I make a mistake?

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

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Contents

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Cap Table Reports and Views	11	
Your Securities Ledger	12	
Your Stakeholder Ledger	13	

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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	• 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	• Cap table access levels • Access requests
HRIS integrations	Allows for automatic syncing of employee data, reducing manual entry and the potential for errors	• How to integrate your HRIS • Benefits of integration

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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
Exercised and Settled Report	A ledger of all option grant exercises, RSU settlements and secondary transactions from plan
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

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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.

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Carta Plugin for Claude

Ask your cap table anything.

Query ownership, stakeholders, and equity data in plain language.

ACTION	RESOURCES
1. Install the Carta Connector	Go to Organization settings → Connectors. *Click Add, search for Carta, and click Add*
2. Authenticate Carta	Log in with your Carta account to authorize access
2. Use a prompt	Read others prompts or share your own on Carta Community: *https://community.carta.com/c/ai-at-carta*
4. Save your artifacts	Refresh your artifact anytime for updates


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