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Preparing to Issue Equity
Core Learning Lab

OCTOBER 2026

PART 3 OF 4

Upcoming Events

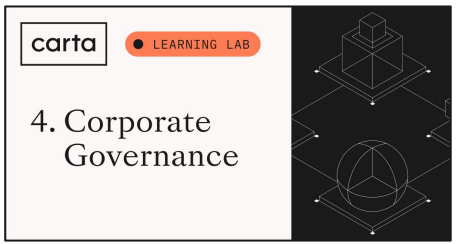
Join live sessions with startup experts, attend product education webinars, and connect with peers facing the same challenges as you.



CAP TABLE PLUGIN

Tuesday, Oct 27
01:00 PM - 02:00 PM PDT

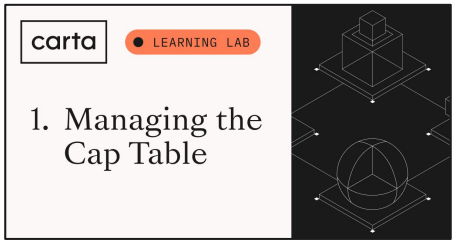
Register →



PART 4 OF 4

Thursday, Nov 5
10:00 AM - 11:00 AM PST

Register →



PART 1 OF 4

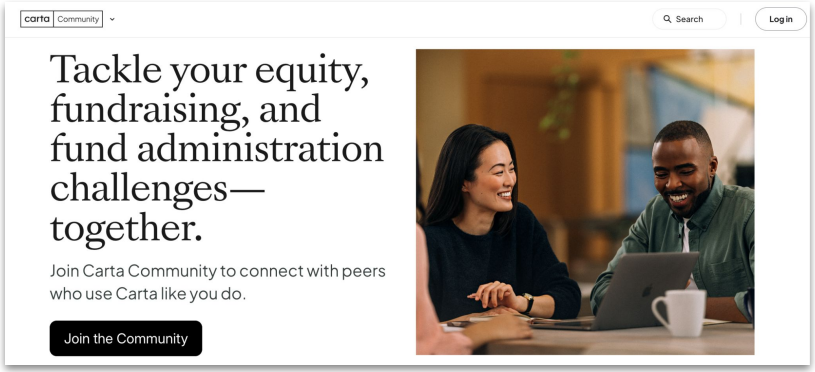
Wednesday, Nov 18
10:30 AM - 11:30 AM PST

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 Program Manager
7 years at Carta



Stewart Barcenas
Channel Support Analyst II
2+ years at Carta


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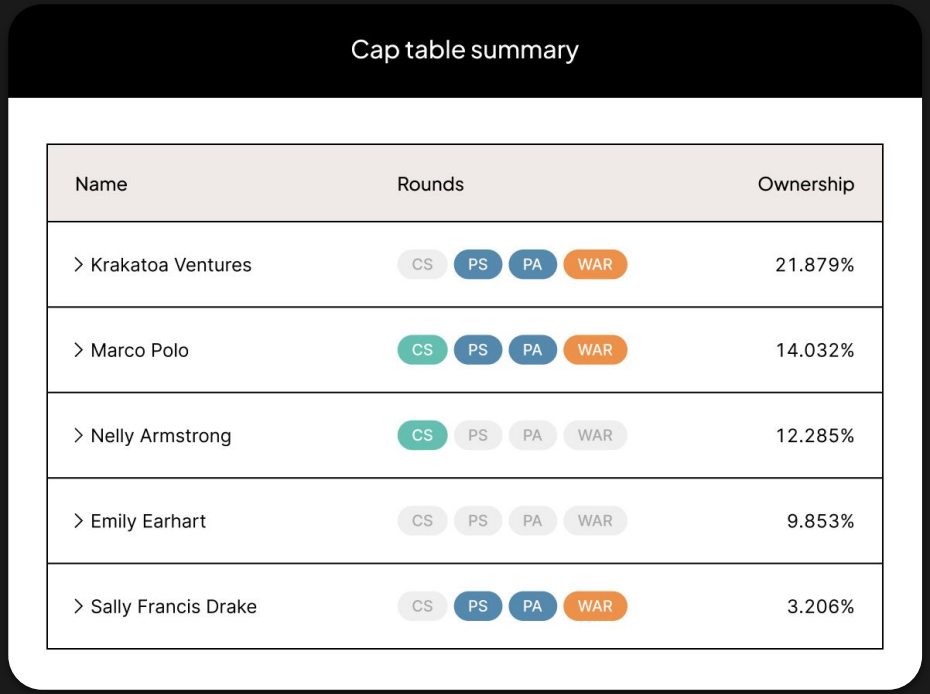
Start with your foundation:

- SHARE CLASSES
- EQUITY INCENTIVE PLAN

Managing Share Classes

Your share classes are the foundation that define voting power, payout priority, and how ownership is structured across all stakeholders.

Starting here ensures your cap table is compliant from the start and set up for future success.



Create Share Class →

Amend Share Class →

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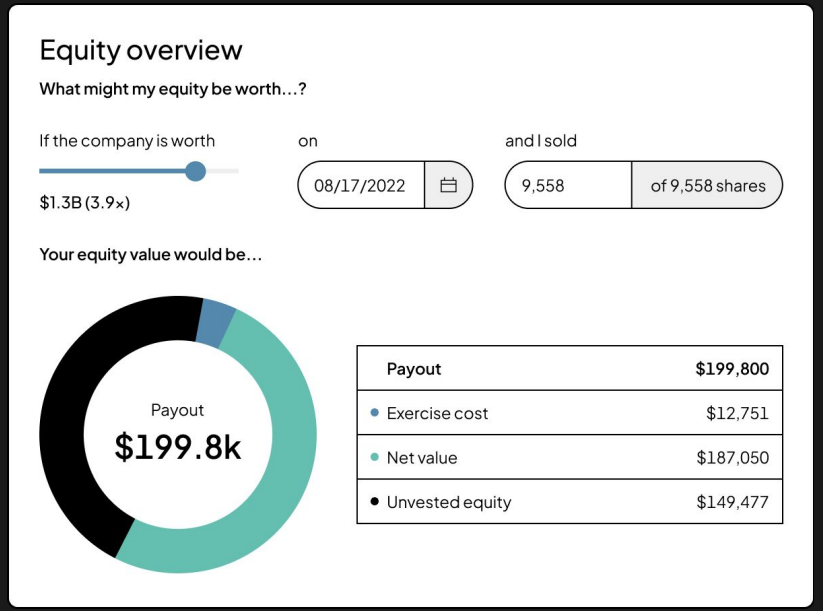
Equity Incentive Plan

Your equity incentive plan is the foundation that defines how you attract, retain, and reward your team.

Setting the rules for granting equity as your company grows.

Create Equity Plan →

Add Existing Plan →



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Securities Templates

Streamlining the equity issuance process by eliminating repetitive administrative work.

DOCUMENT SETS

Group the right agreements and attachments for each security type—ensuring every grant includes the correct legal documents from the start.

VESTING SCHEDULES

Save and reuse standard vesting templates—ensuring consistency, accuracy, and faster issuance across all awards.

LEGENDS

Apply custom or default disclosure language that automatically appears on security certificates—used to flag important terms, restrictions, or notices.

ADDITIONAL TERMS

Attach milestone-based or acceleration terms to awards when time-based vesting alone doesn't tell the whole story.

How to Manage Securities Templates →

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Carta Plugin for Claude

Ask your cap table anything.

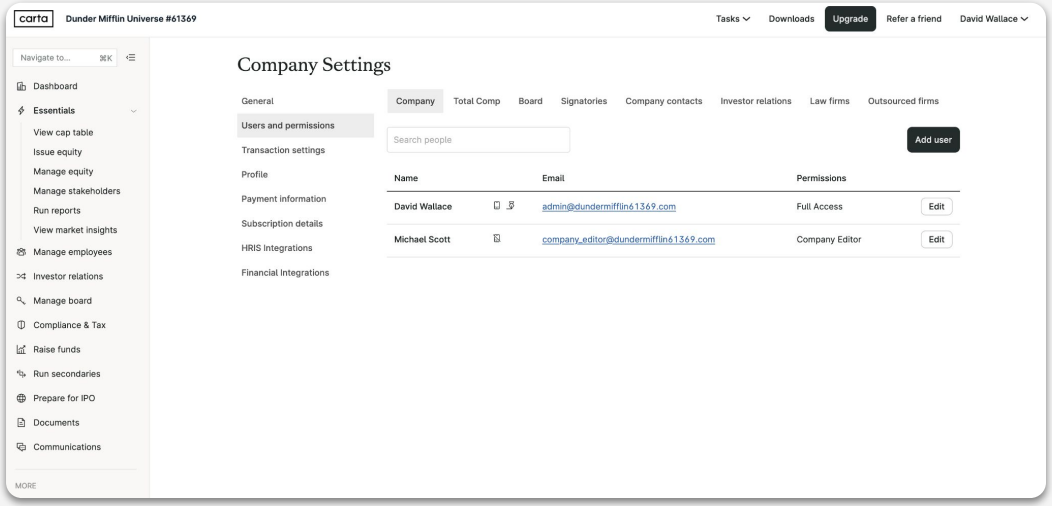
Query ownership, stakeholders, and equity data in plain language.

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

Company Settings

The foundation your cap table relies on.

If your settings aren't correct, everything else—from managing the cap table to approving exercises— can lead to downstream issues.



Permissions levels →

Integrating HRIS →

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