

Preparing to Issue Equity

Core Learning Lab

FEBRUARY
2026

Upcoming Events

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

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● Learning Lab

4. Corporate Governance

■ PART 4 OF 4

February 26, 2026
12:00 - 13:00 (PT)

Register →

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● Learning Lab

1. Managing the Cap Table

■ PART 1 OF 4

January 29th, 2026
11:00 - 12:00 (PT)

Register →

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● Learning Lab

2. Fundraising Tools

■ PART 2 OF 4

January 27th, 2026
12:30 - 13:30 (PT)

Register →

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● Learning Lab

3. Preparing to Issue Equity

■ PART 3 OF 4

February 11th, 2026
10:30 - 11:30 (PT)

Register →

Upcoming Events

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

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● Learning Lab

4. Corporate Governance

■ PART 4 OF 4

February 26, 2026
12:00 - 13:00 (PT)

Register →

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● Learning Lab

1. Managing the Cap Table

■ PART 1 OF 4

March 18th, 2026
11:00 - 12:00 (PT)

Register →

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● Learning Lab

2. Fundraising Tools

■ PART 2 OF 4

April 9th, 2026
12:00 - 01:00 (PT)

Register →

Continue the conversation..

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

- Learning Paths
- Carta Certified
- Register for future **Learning Labs**

The screenshot displays the Carta Community website. At the top, the 'Carta Community' header includes the tagline 'Solve your cap table and fundraising challenges, together.' and buttons for 'Sign in' and 'Sign up'. A search bar is positioned below the header. To the right, a photo shows three people in a meeting. The main content area features three cards: 'New to Carta Community? Start here', 'Carta discussion forums', and 'User groups'. Below this is a 'CARTA LEARNING' section with the heading 'Learn how to make Carta work for you' and the subtext 'Practical, role-based learning designed to help you build, grow, and succeed.' Navigation links for 'On-Demand Learning', 'Live Training', and 'Certification' are provided. The bottom section, titled 'Start learning with a path that fits your founder journey', includes a paragraph about personalized learning paths and an 'Explore Learning Paths' button. A photo of a man working on a laptop is on the right.

Carta Community

Solve your cap table and fundraising challenges, together.

Sign in Sign up

Search Carta Community

New to Carta Community? Start here
A great place to start to ensure you are set up for success

Carta discussion forums
Join the conversation about all things Carta, equity compensation, startups, fundraising, and more

User groups
Join a user group to network and join discussions with your peers

CARTA LEARNING

Learn how to make Carta work for you

Practical, role-based learning designed to help you build, grow, and succeed.

On-Demand Learning Live Training Certification

Start learning with a path that fits your founder journey

No two companies grow the same way. Choose a learning path tailored to where you are today—whether you're just getting started or preparing for your next round.

Explore Learning Paths

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REVIEW US ON G2

If Carta's helped
you grow, scale, or
simplify, share your
experience on G2.



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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.



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Start with your foundations:

■ 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 →

Cap table summary

Name	Rounds	Ownership
> Krakatoa Ventures	CS PS PA WAR	21.879%
> Marco Polo	CS PS PA WAR	14.032%
> Nelly Armstrong	CS PS PA WAR	12.285%
> Emily Earhart	CS PS PA WAR	9.853%
> Sally Francis Drake	CS PS PA WAR	3.206%

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 →

Equity overview

What might my equity be worth...?

If the company is worth



\$1.3B (3.9x)

on

08/17/2022



and I sold

9,558

of 9,558 shares

Your equity value would be...



Payout	\$199,800
• Exercise cost	\$12,751
• Net value	\$187,050
• Unvested equity	\$149,477

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

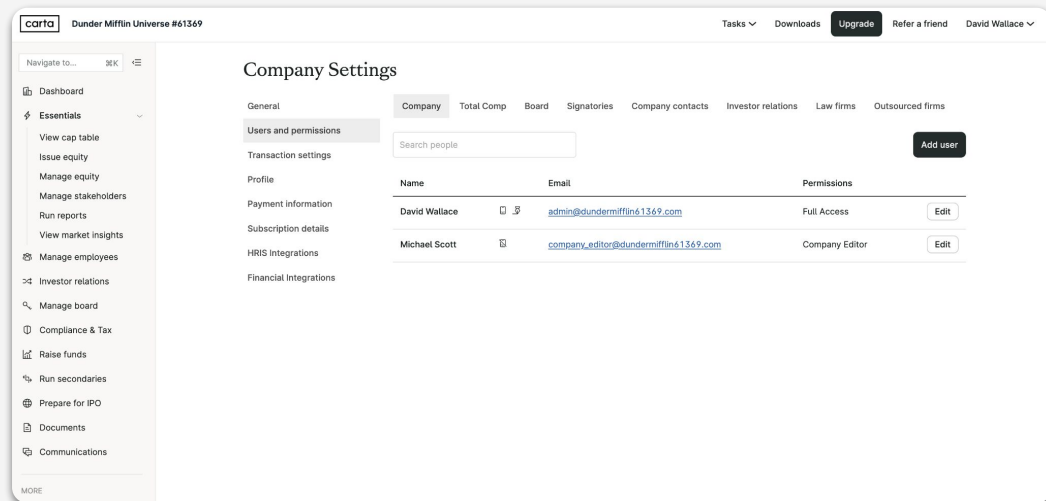
Attach milestone-based or acceleration terms to awards when time-based vesting alone doesn't tell the whole story.

[How to Manage Securities Templates →](#)

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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