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Preparing to Issue Equity
Core Learning Lab

MAY 2026

PART 3 OF 4

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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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4. Corporate Governance

PART 4 OF 4

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

Register →

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1. Managing the Cap Table

PART 1 OF 4

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

Register →

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2. Fundraising Tools

PART 2 OF 4

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

Register →

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3. Preparing to Issue Equity

PART 3 OF 4

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

Register →

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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

May 13th, 2026
12:00 - 13:00 (PT)

Register →

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Learning Lab

1. Managing the Cap Table

PART 1 OF 4

May 28th, 2026
11:30 - 12:30 (PT)

Register →

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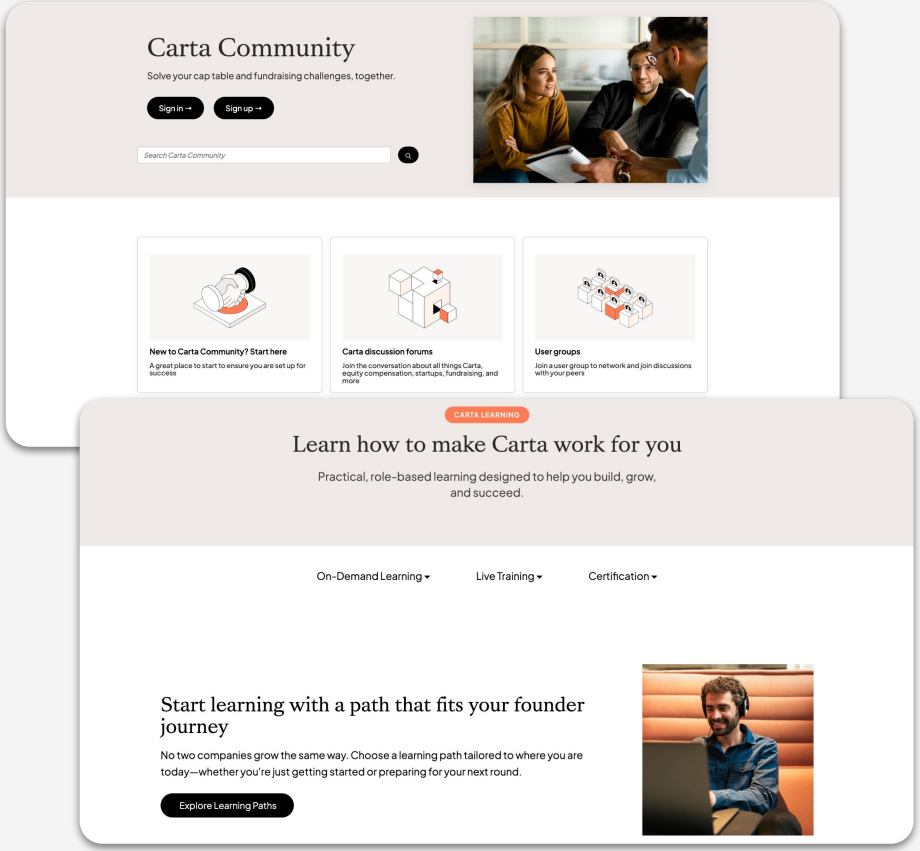
Continue the conversation..

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

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



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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.

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%

Create Share Class →

Amend Share Class →

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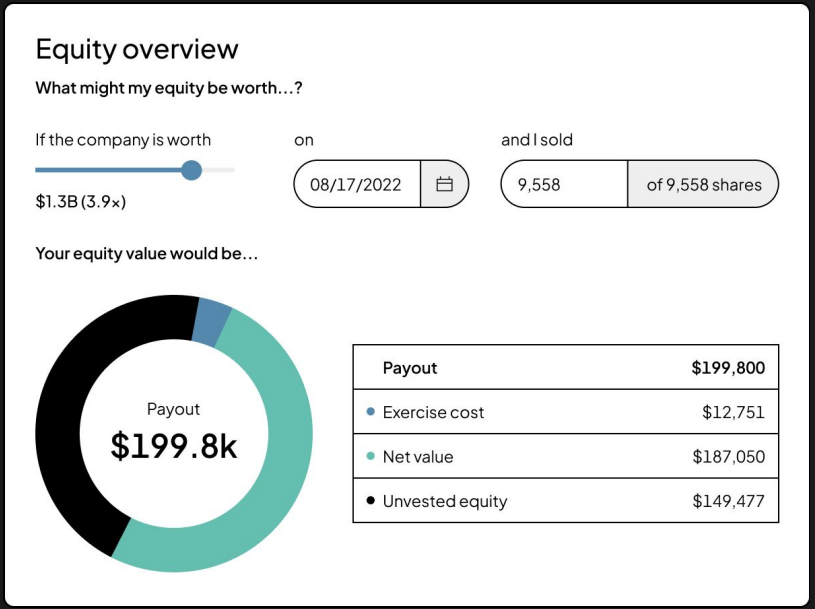
Equity Incentive Plan

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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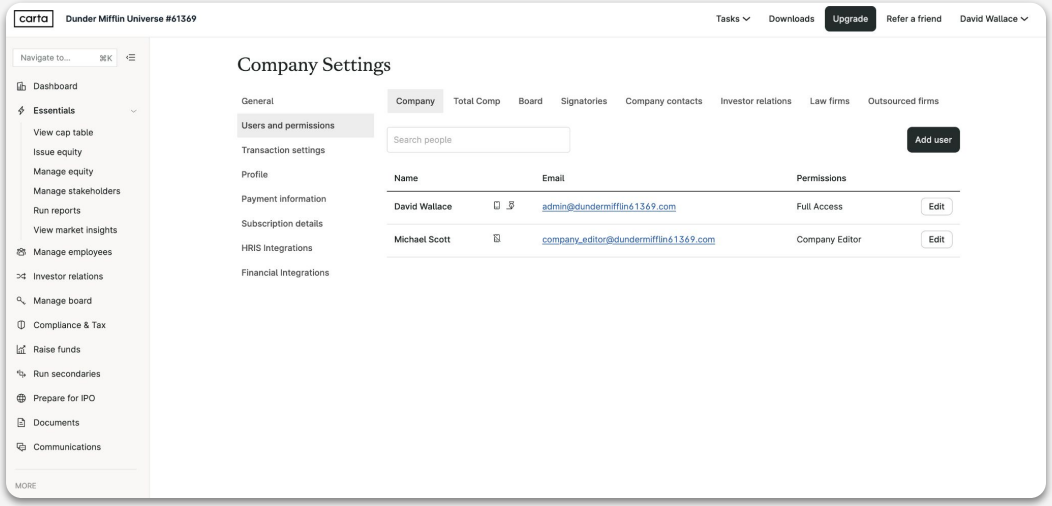
Company Settings

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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