Pulley to Carta

Fix, go live, and get started.

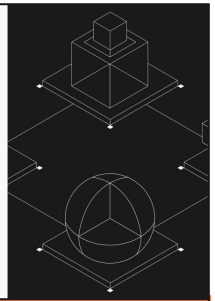
In 60 minutes, fix any missing data, go live on Carta, and learn where to find everything you used in Pulley

Q4 2026

Upcoming Events

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

carta LEARNING LAB



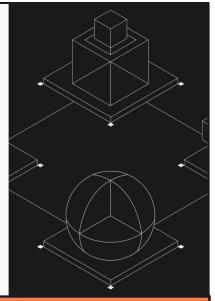
1. Managing the Cap Table

PART 1 OF 4

Wednesday, Nov. 18th
10:30 AM - 11:30 AM PDT

Register →

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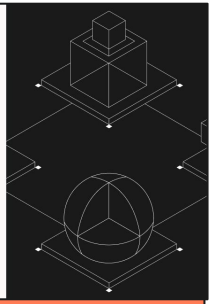
2. Fundraising Tools

PART 2 OF 4

Thursday Jan. 14th
11:00 AM - 12:00 PM PDT

Register →

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3. Preparing to Issue Equity

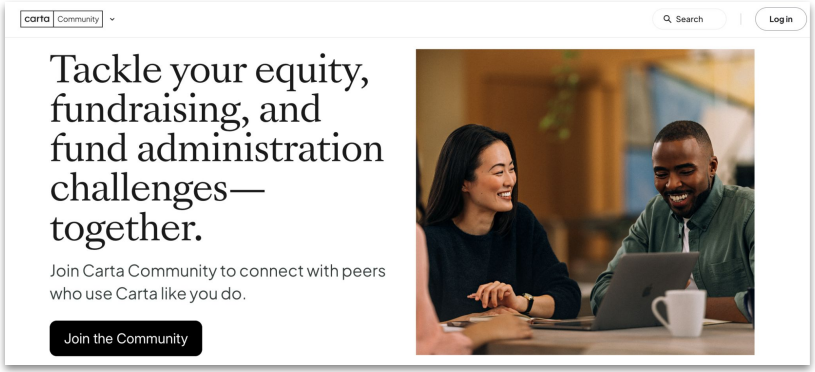
PART 3 OF 4

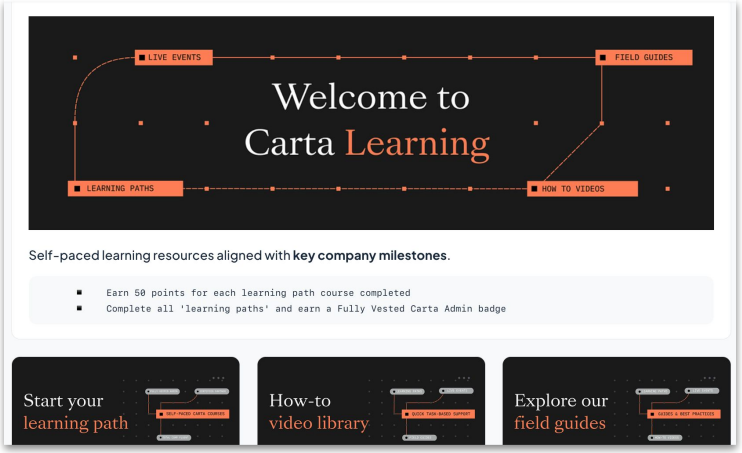
Tuesday, Dec. 1st
12:00 PM - 1:00 PM PDT

Register →

Continue the conversation..

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






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Meet the speakers



Brianne Villamor
Customer Program Manager



Thiago Kühl
Delivery Specialist

What we will cover, and what we will not

TODAY

- Your cap table, 409A, and issuing equity
- Ask questions in chat or come off mute
- The recording will be posted to Carta Community

NOT TODAY

- Pricing, contracts, or migration timing: email subscription@carta.com
- Account-specific questions: we will follow up after the session

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Complete your cap table

Three simple steps

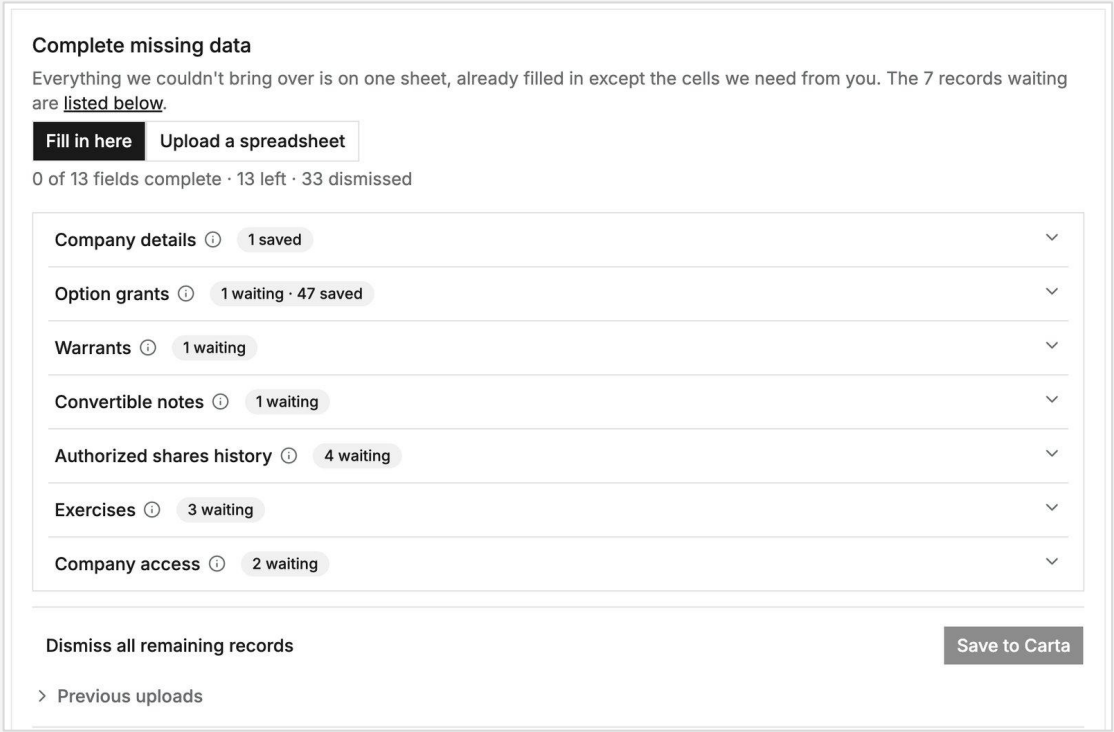
Only full access users can make changes.

1 . SET UP IN CARTA	2 . COMPLETE MISSING DATA	3. TAKE YOUR ACCOUNT LIVE
Optional ISO/NSO split	Complete your data in-app	Locked until the first two steps are done
Assign signatories (People > Signatories)	Or upload a spreadsheet	Sign your securities
Choose a primary contact (People > Roles)	Review your data in-app	Send your account live

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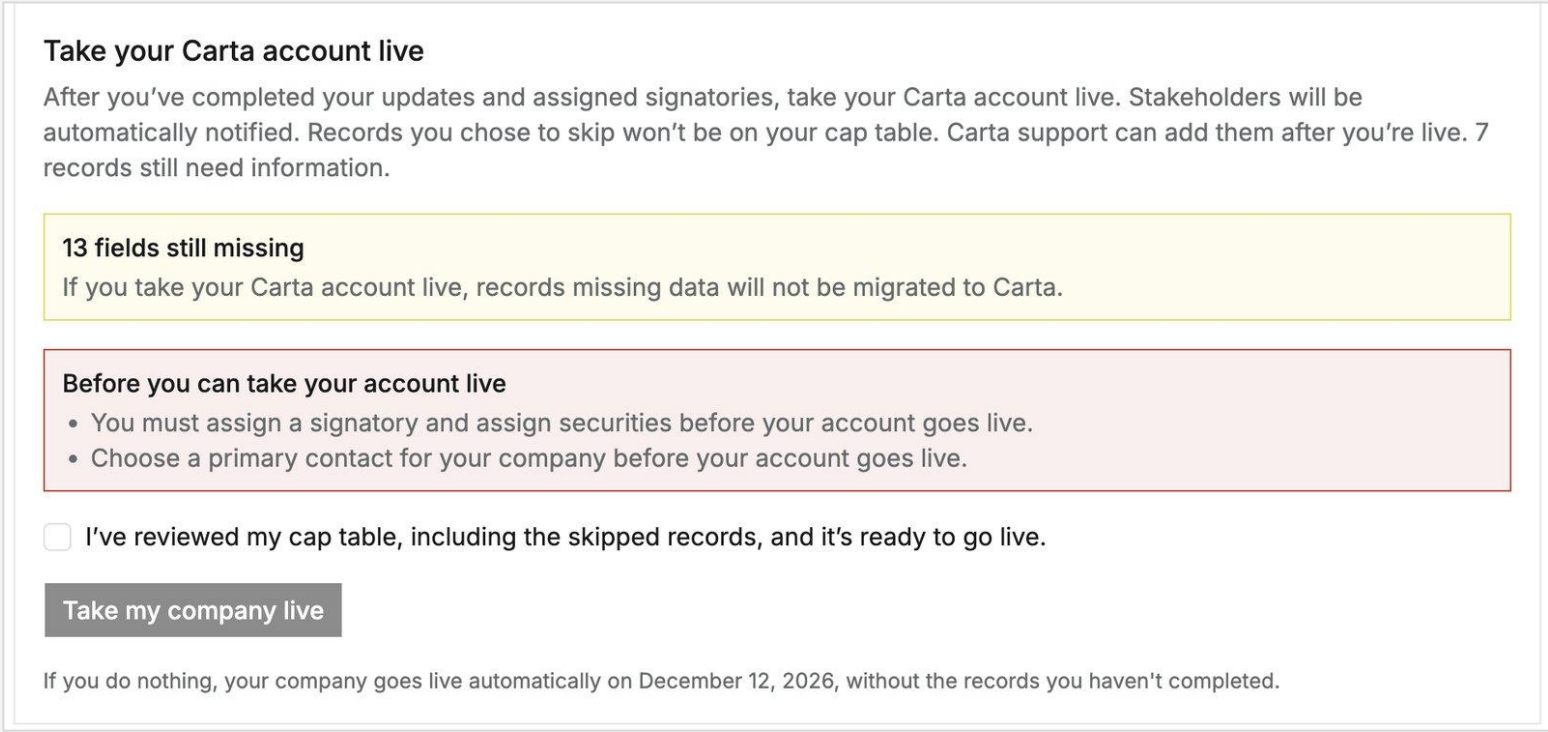
See everything waiting in one place

Work through each section, then save to Carta.



Take your Carta account live

Review the cap table, check the box, then click the button.



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Cap table management basics

Used it in Pulley? Here is where it lives in Carta

Your data room holds all your data, including documents.



Data room

All your data, including documents like option agreements and SAFEs



Securities ledger

Under Manage equity. Edit security details like vesting start date and grant date



Stakeholder ledger

A valid email for every stakeholder, edit details, merge duplicates



Company settings

Users and permissions, signatories, company contacts



Cap table views

By stakeholder or share class, back in time, health checks, reports

Before you issue

When issuing equity, success is mostly about preparation.



Full access permissions



Current signatories for each security type



Share classes in place



Equity incentive plan with room



All necessary securities templates



Current FMV (for options)

Where to go when you need help

Transition guide	community.carta.com/c/pulley-to-carta-learn
Help articles	support.carta.com: what to expect, how to add a non-Carta FMV, how to draft and issue option grants
Contracts, pricing, migration	subscription@carta.com
409A questions	409a@carta.com


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