Pulley to Carta

Fix, go live, and get started.

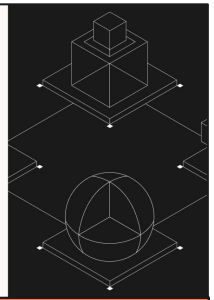
In 60 minutes, fix any missing data, go live on Carta, and learn where to find everything you used in Pulley

Q4 2026

Upcoming Events

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

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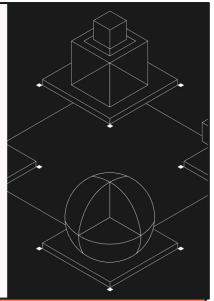
2. Fundraising Tools

PART 2 OF 4

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

Register →

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3. Preparing to Issue Equity

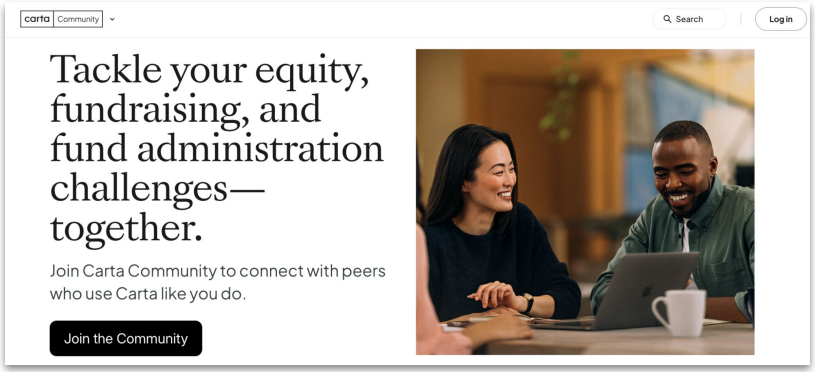
PART 3 OF 4

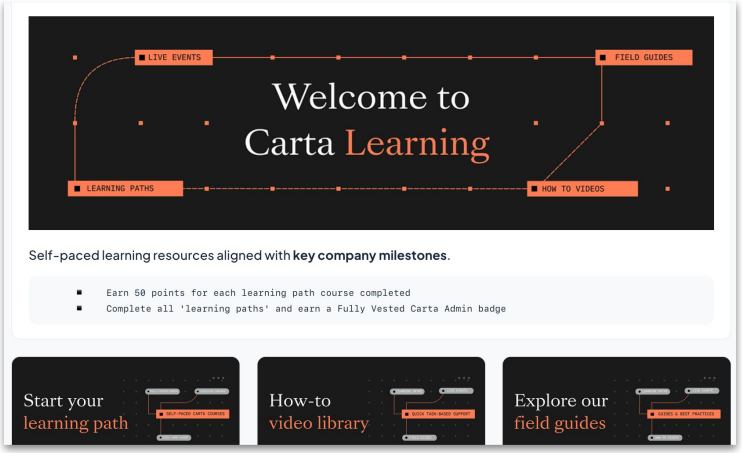
Tuesday, Dec. 1st
12:00 PM - 1:00 PM PDT

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



Cesar Silveira
Delivery Specialist



Izabela Focas
Technical Lead


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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

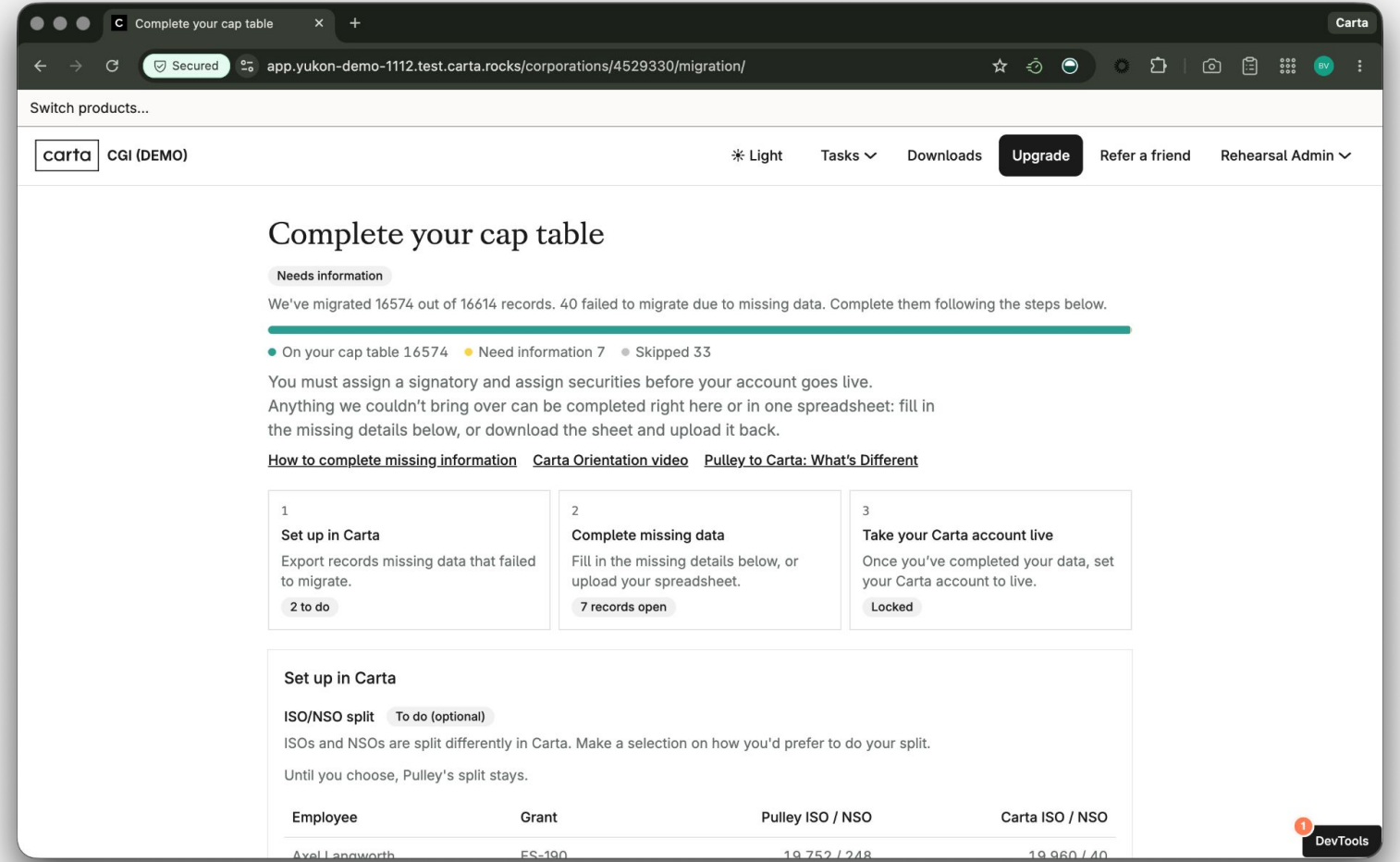
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Complete your cap table

Three simple steps

Only full access users can make changes.

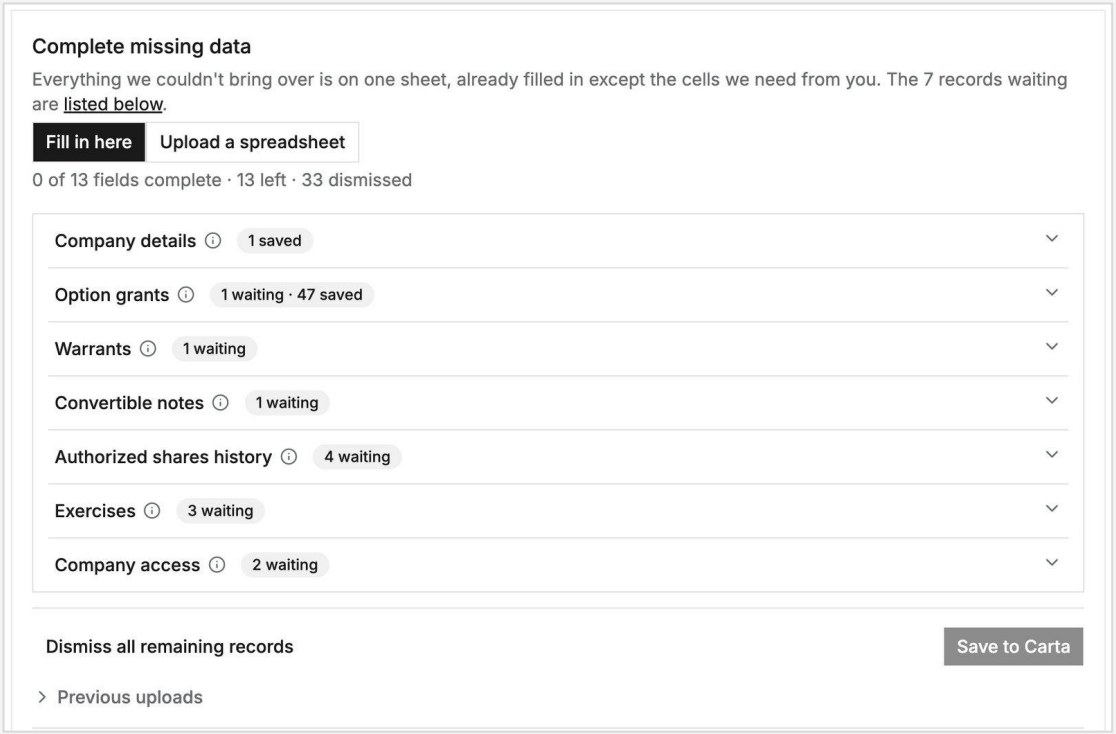
1 . SET UP IN CARTA	2 . COMPLETE MISSING DATA	3. TAKE YOUR ACCOUNT LIVE
Optional ISO/NSO split	Complete your data in-app	Locked until the first two steps are done
Assign signatories (People > Signatories)	Or upload a spreadsheet	Sign your securities
Choose a primary contact (People > Roles)	Review your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

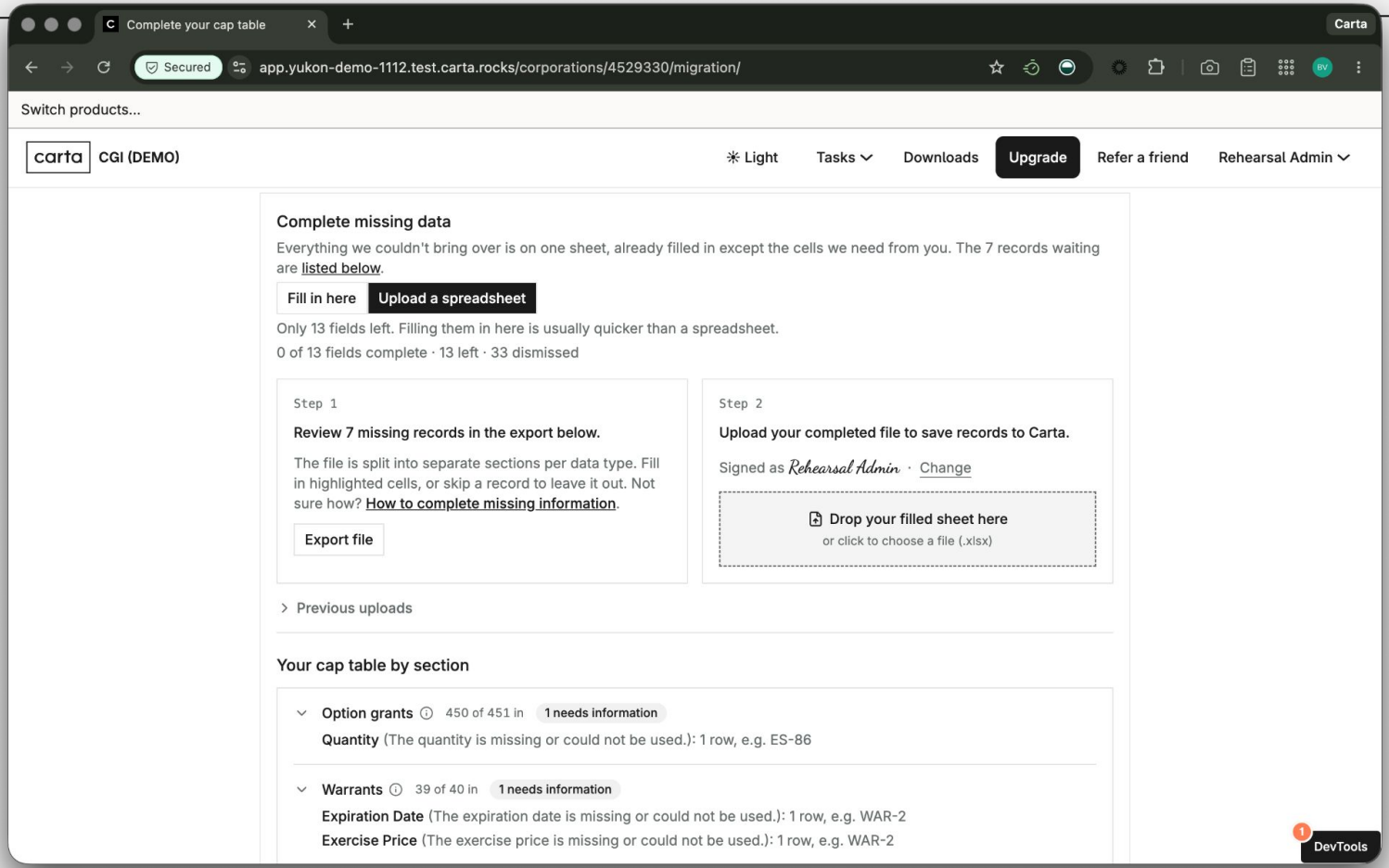

Complete your cap table
Carta
Secured
app.yukon-demo-1112.test.carta.rocks/corporations/4529330/migration/
Switch products...
carta
CGI (DEMO)
Light
Tasks
Downloads
Upgrade
Refer a friend
Rehearsal Admin
Complete your cap table
Needs information
We've migrated 16574 out of 16614 records. 40 failed to migrate due to missing data. Complete them following the steps below.
On your cap table 16574
Need information 7
Skipped 33
You must assign a signatory and assign securities before your account goes live.
Anything we couldn't bring over can be completed right here or in one spreadsheet: fill in the missing details below, or download the sheet and upload it back.
How to complete missing information
Carta Orientation video
Pulley to Carta: What's Different
1
Set up in Carta
Export records missing data that failed to migrate.
2 to do
2
Complete missing data
Fill in the missing details below, or upload your spreadsheet.
7 records open
3
Take your Carta account live
Once you've completed your data, set your Carta account to live.
Locked
Set up in Carta
ISO/NSO split
To do (optional)
ISOs and NSOs are split differently in Carta. Make a selection on how you'd prefer to do your split.
Until you choose, Pulley's split stays.
Employee
Grant
Pulley ISO / NSO
Carta ISO / NSO
Axel Langworth
FS-190
19,752 / 248
19,960 / 40
DevTools

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See everything waiting in one place

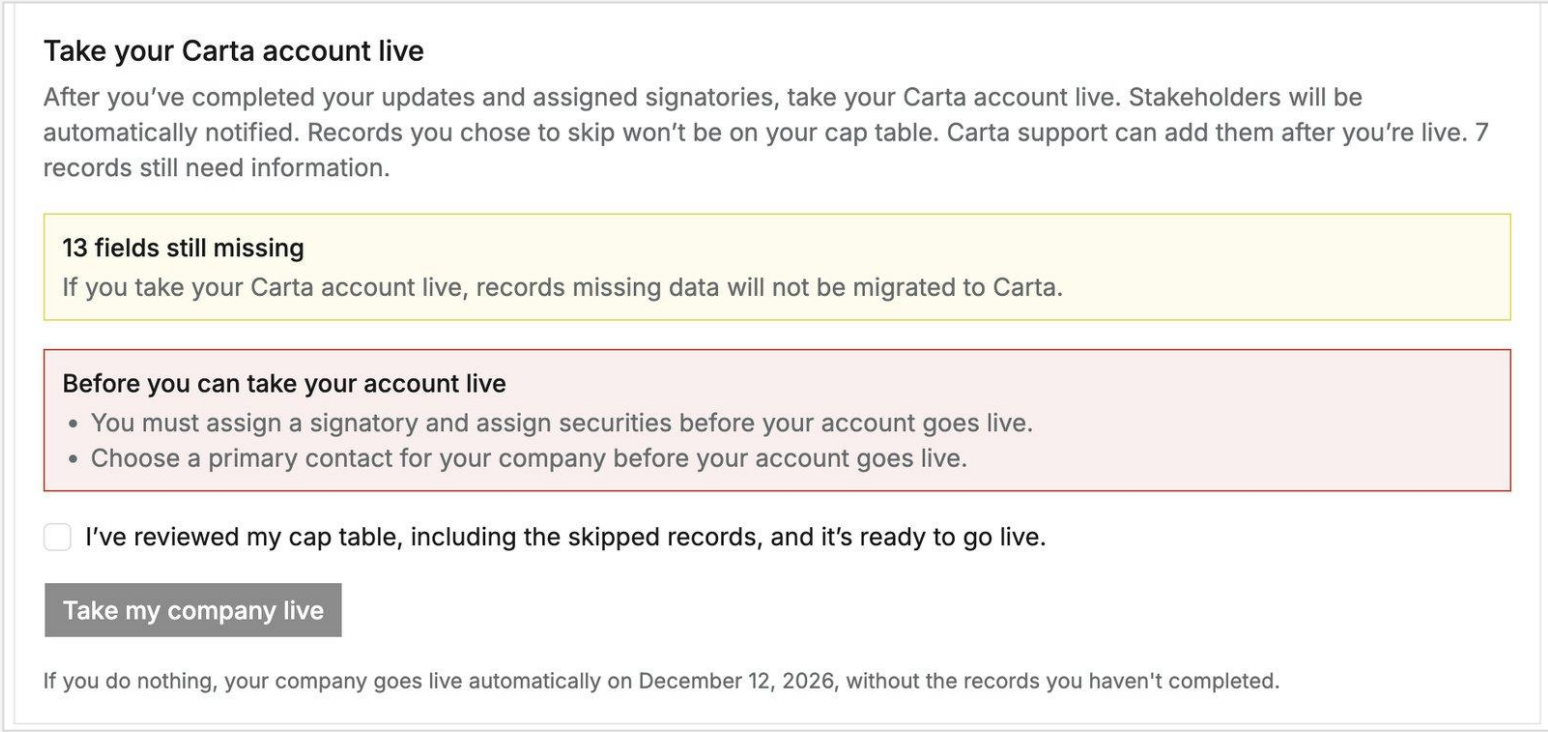
Work through each section, then save to Carta.




Complete your cap table
Carta
Secured
app.yukon-demo-1112.test.carta.rocks/corporations/4529330/migration/
Switch products...
carta
CGI (DEMO)
Light
Tasks
Downloads
Upgrade
Refer a friend
Rehearsal Admin
Complete missing data
Everything we couldn't bring over is on one sheet, already filled in except the cells we need from you. The 7 records waiting are listed below.
Fill in here
Upload a spreadsheet
Only 13 fields left. Filling them in here is usually quicker than a spreadsheet.
0 of 13 fields complete · 13 left · 33 dismissed
Step 1
Review 7 missing records in the export below.
The file is split into separate sections per data type. Fill in highlighted cells, or skip a record to leave it out. Not sure how? How to complete missing information.
Export file
Step 2
Upload your completed file to save records to Carta.
Signed as Rehearsal Admin · Change
Drop your filled sheet here
or click to choose a file (.xlsx)
Previous uploads
Your cap table by section
Option grants 450 of 451 in 1 needs information
Quantity (The quantity is missing or could not be used.): 1 row, e.g. ES-86
Warrants 39 of 40 in 1 needs information
Expiration Date (The expiration date is missing or could not be used.): 1 row, e.g. WAR-2
Exercise Price (The exercise price is missing or could not be used.): 1 row, e.g. WAR-2
DevTools

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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