carta

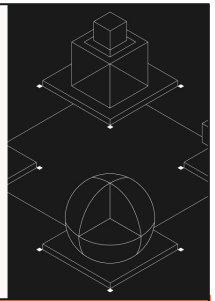
Claude x Carta
Cap Table Plugin

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



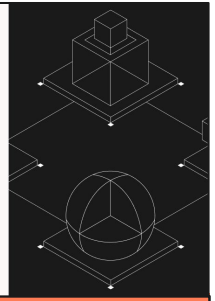
1. Managing the Cap Table

PART 1 OF 4

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

Register →

carta LEARNING LAB



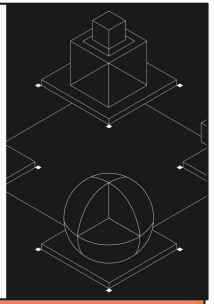
2. Fundraising Tools

PART 2 OF 4

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

Register →

carta LEARNING LAB



3. Preparing to Issue Equity

PART 3 OF 4

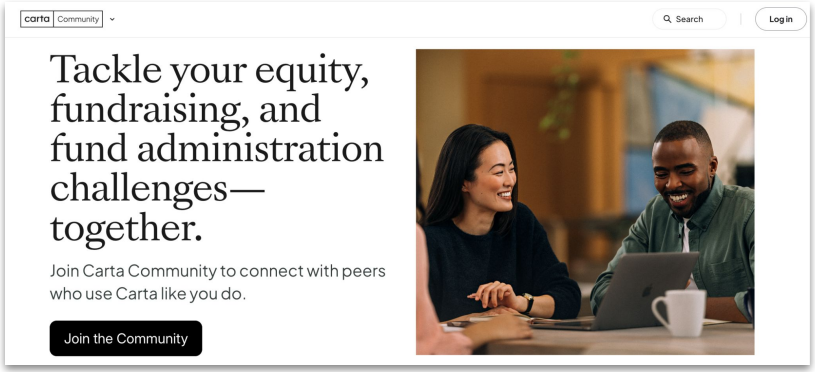
Tuesday, Dec. 1st
12:00 PM - 1:00 PM PDT

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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Agenda

Topic

- Introductions + Settle in
- Claude Foundations
- Build your Cap Table Home
- Equity Queries + Reporting Artifact
- Equity Issuance Demo
- Wrap up + Q&A

How to get help during the session

Type "**stuck**"or raise your hand 🖐 in the chat.

The host will move you into a one-on-one help room.
Leave and rejoin the main session any time.

Use the Zoom desktop app, not the browser, so help rooms work.

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Meet the speakers



Brianne Villamor
Customer Program Manager



Thiago Kühl
AI Specialist



Cesar Silveira
AI Specialist

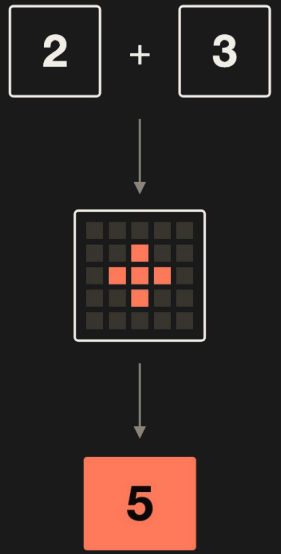

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Understanding Claude Tools

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Arithmetic vs Word Calculator

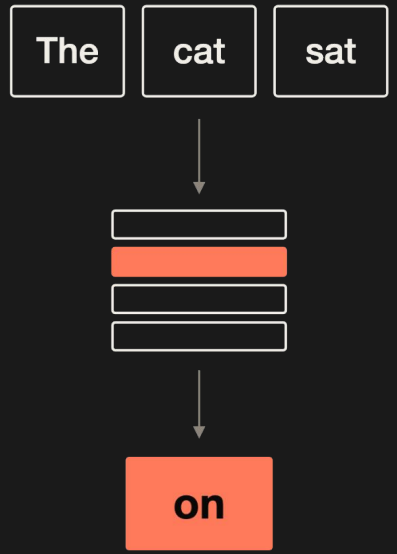
ARITHMETIC CALCULATOR



Two numbers in → one number out

Always exactly 5. Every time.

WORD CALCULATOR



Three words in → predicts the most likely next word

Probability, not arithmetic.

Claude Tools
Understanding the difference

YES - You Need Desktop!

Claude
(Chat & Cowork)

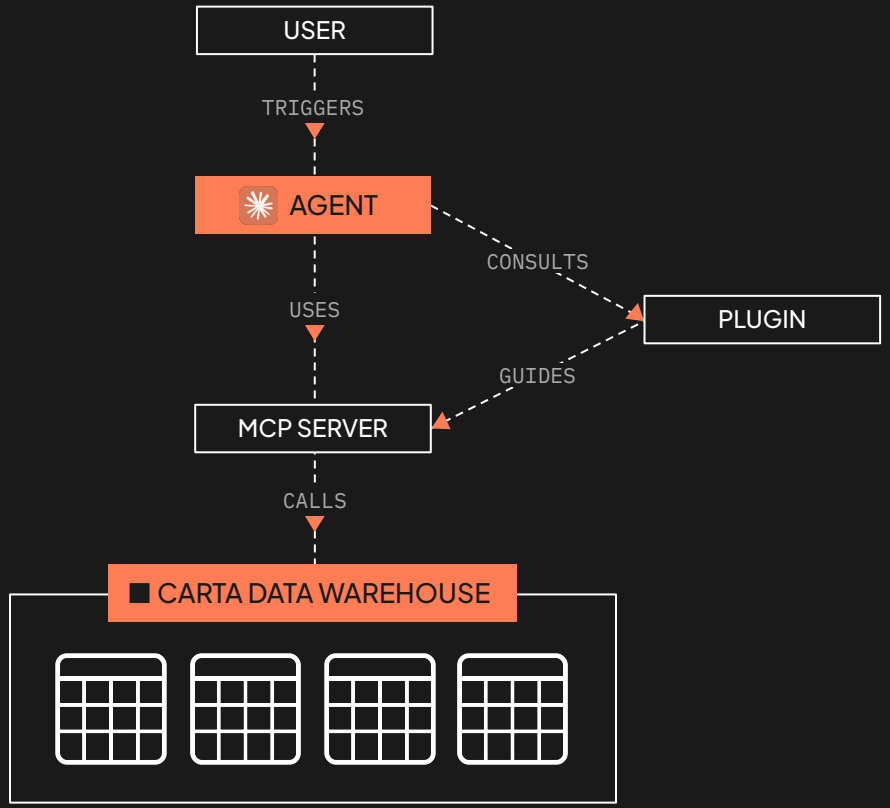
Autonomous AI that independently executes multi-step workflows. More user-friendly and communicative

Claude Code

Write scripts, automate tasks, build coding projects. Created for engineers and advanced AI builders

What is an Agent, MCP, plugin, skill, tool?

How does an AI agent work?



Agents: At their essence, Agents consist of two things: an LLM and a trigger. You can add context, skills, and tools to customize agents for specific use cases

Plugins: Make agents like Claude reliable by guiding them toward the right data source and more powerful with skills and artifacts out of the box

MCPs/Connectors: Superpowered data pipelines, giving Claude access to the broadest possible dataset on demand

What is a skill?

■ Skill

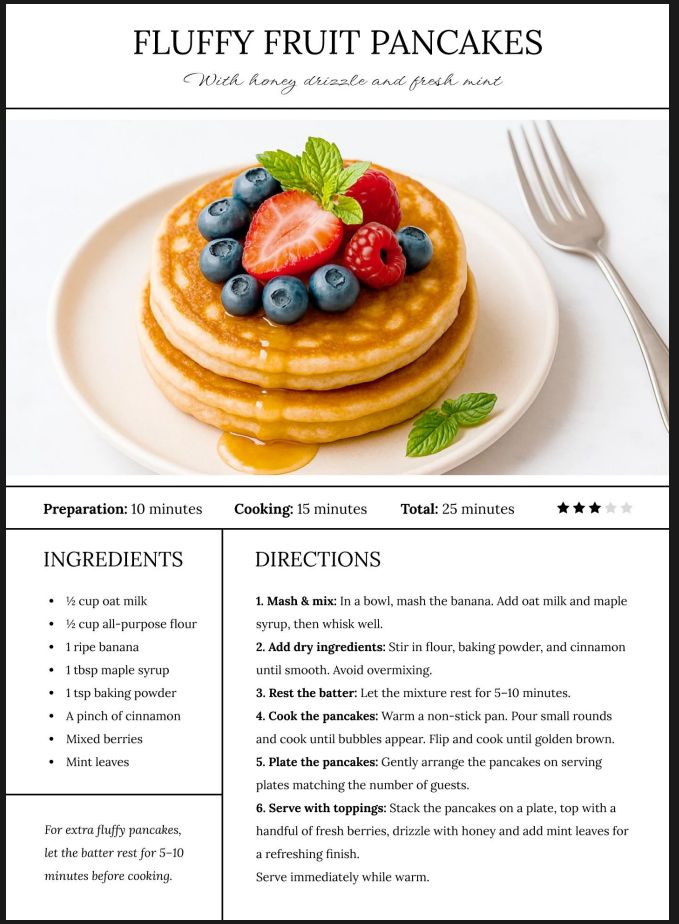
A saved set of instructions that combines multiple steps and tools into a reusable template. It includes folders of markdown files, code scripts, and tool calls, and is often bundled with other skills in a plugin

Skills teach Claude how to complete specific tasks in a repeatable way.

Analogy: Recipe of written steps for Claude to be used repeatedly and shared.

A **Carta skill** has been built with:

- Validated Carta data
- Permissions
- Accurate calculations
- Testing



FLUFFY FRUIT PANCAKES

With honey drizzle and fresh mint

Preparation: 10 minutes **Cooking:** 15 minutes **Total:** 25 minutes ★★★☆☆

INGREDIENTS

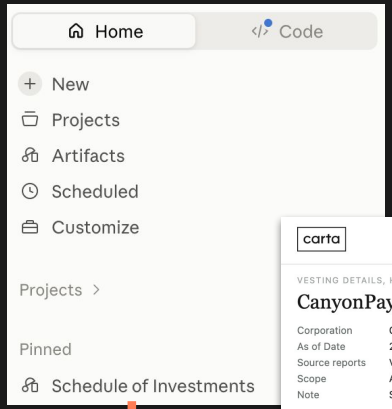
- ½ cup oat milk
- ½ cup all-purpose flour
- 1 ripe banana
- 1 tbsp maple syrup
- 1 tsp baking powder
- A pinch of cinnamon
- Mixed berries
- Mint leaves

For extra fluffy pancakes, let the batter rest for 5–10 minutes before cooking.

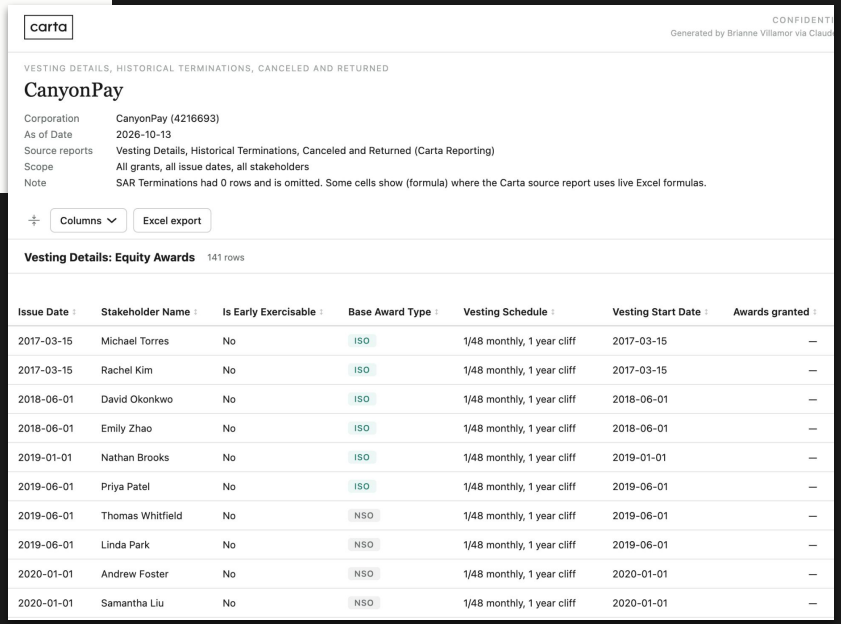
DIRECTIONS

1. Mash & mix: In a bowl, mash the banana. Add oat milk and maple syrup, then whisk well.
2. Add dry ingredients: Stir in flour, baking powder, and cinnamon until smooth. Avoid overmixing.
3. Rest the batter: Let the mixture rest for 5–10 minutes.
4. Cook the pancakes: Warm a non-stick pan. Pour small rounds and cook until bubbles appear. Flip and cook until golden brown.
5. Plate the pancakes: Gently arrange the pancakes on serving plates matching the number of guests.
6. Serve with toppings: Stack the pancakes on a plate, top with a handful of fresh berries, drizzle with honey and add mint leaves for a refreshing finish.
Serve immediately while warm.

What is a live artifact?



Pin artifacts for easy access!



Issue Date	Stakeholder Name	Is Early Exercisable	Base Award Type	Vesting Schedule	Vesting Start Date	Awards granted
2017-03-15	Michael Torres	No	ISO	1/48 monthly, 1 year cliff	2017-03-15	—
2017-03-15	Rachel Kim	No	ISO	1/48 monthly, 1 year cliff	2017-03-15	—
2018-06-01	David Okonkwo	No	ISO	1/48 monthly, 1 year cliff	2018-06-01	—
2018-06-01	Emily Zhao	No	ISO	1/48 monthly, 1 year cliff	2018-06-01	—
2019-01-01	Nathan Brooks	No	ISO	1/48 monthly, 1 year cliff	2019-01-01	—
2019-06-01	Priya Patel	No	ISO	1/48 monthly, 1 year cliff	2019-06-01	—
2019-06-01	Thomas Whitfield	No	NSO	1/48 monthly, 1 year cliff	2019-06-01	—
2019-06-01	Linda Park	No	NSO	1/48 monthly, 1 year cliff	2019-06-01	—
2020-01-01	Andrew Foster	No	NSO	1/48 monthly, 1 year cliff	2020-01-01	—
2020-01-01	Samantha Liu	No	NSO	1/48 monthly, 1 year cliff	2020-01-01	—

■ Live Artifacts

Interactive views generated by Claude: dashboards, reports, tear sheets. Instead of exporting a static PDF or screenshot, you get a rich, visual output you can interact with and easily edit.

Each artifact is a structured data table with a defined use case, and should be built to quickly retrieve and analyze data you use regularly.

They are faster, more reliable, and cheaper to update than repeatedly using a skill

Analogy: Recipe of written steps for Claude to be used repeatedly and shared.

What the Carta cap table plugin can do

LOOK UP

Ask in plain language

409A history, unvested shares, a full picture of one employee's equity

BUILD

Build a cap table home or other reporting artifacts

An artifact you build once. Create your view and refresh any time.

ISSUE

Draft and issue directly from Claude

`/carta-issuance` uses the same defaults and validation as Carta

Where can this save you time?

GRANT CYCLES

Repeat work, done once

Describe who gets what or upload your spreadsheet directly to Claude

AUDIT PREP/REPORTING

Answers with sources

Ask Claude to cite the source and as-of date for every figure

MANY COMPANIES

Same skills everywhere

Run the same request across each cap table you manage

Prompting + Claude Customization

Claude prompt basics

■ 4 Requirements for a Great Prompt

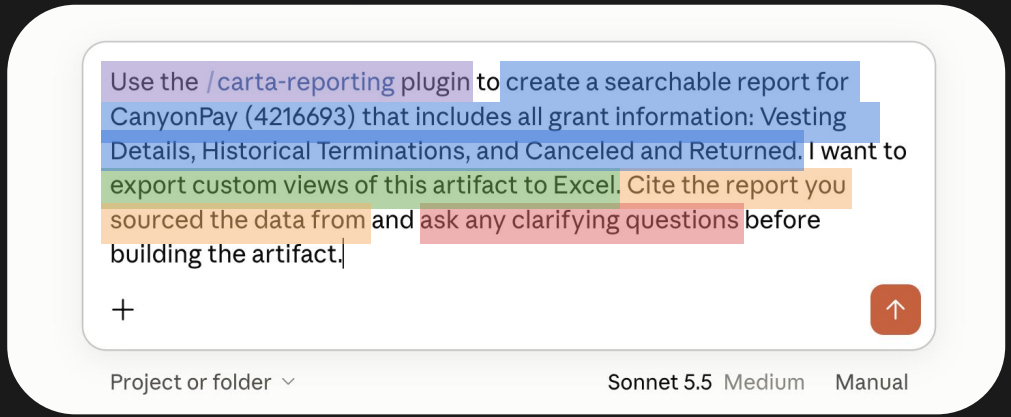
Context: What Claude needs to know: source documents, connectors/plugins, existing skills

Goal: What output you want from Claude: grant information, 409a valuation data, employee specific information

Format: How you want outputs to be presented: branded PDF, spreadsheet, artifact structure

Constraints: What guidelines to follow: citing sources, context to ignore, actions it can't take

Important: Tell Claude to **ask you clarifying questions** along the way.



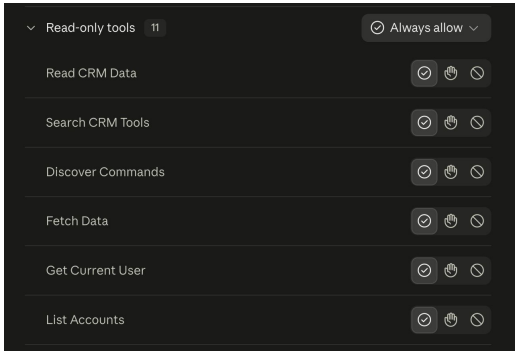
Setup and Permissions

Connector permissions

ALWAYS ALLOW

READ-ONLY TOOLS:

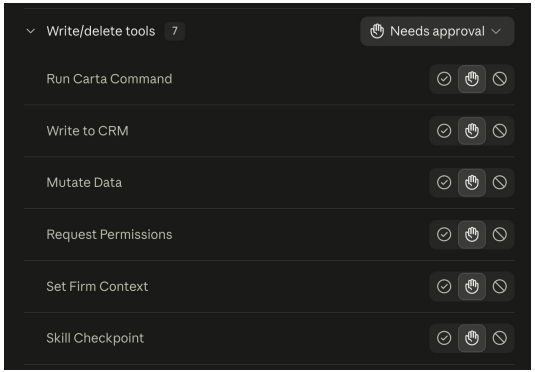
Lookups run without stopping to ask



NEEDS APPROVAL

ANYTHING THAT WRITES:

You see it before it happens



BLOCKED

OFF LIMITS:

Claude cannot use the tool

Let’s try it live, together!

Start a new chat

First, ask for authentication.
Then dive into your questions.

COMPANY SPECIFIC

- What's my 409A valuation history?
- Show the financing round history for [Company] and who invested in each round.
- Show me all SAFEs and convertible notes outstanding for [Company].

EMPLOYEE SPECIFIC

- Show me unvested shares for [Employee].
- When does [employee name]'s cliff hit, and how many shares are still unvested?
- Which awards are still awaiting acceptance?

THE FULL PICTURE

- Show me a full picture of [Employee]'s equity: holdings, what will vest or forfeit, or what was canceled.
- Export the full securities ledger for [Company] to Excel, sorted by issue date.
- Show me every option grant that's been granted at [Company] with its holder, quantity, and status.

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Build your Cap Table Home (artifact)

1

Type /carta-captable-home-build

Or ask Claude to build you a cap table home, include the company name* and hit enter.

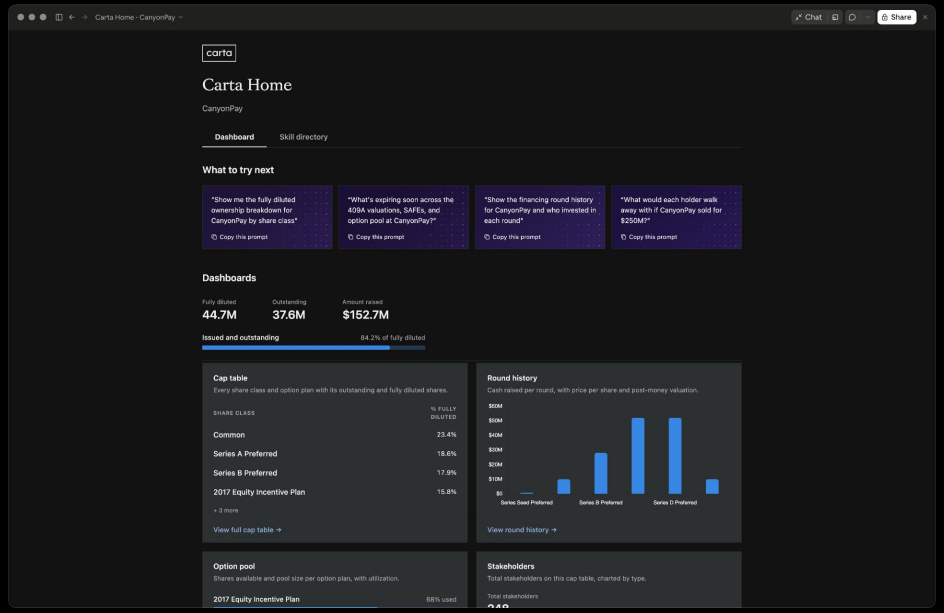
**if you have access to more than one company*

2

Your dashboard renders and pins in the sidebar.

This is an artifact: build it once, refresh it later. Use it as your launchpad and menu of skills.

Open a new chat for each question.



Reports can become artifacts

1

Ask for a report, not a single answer

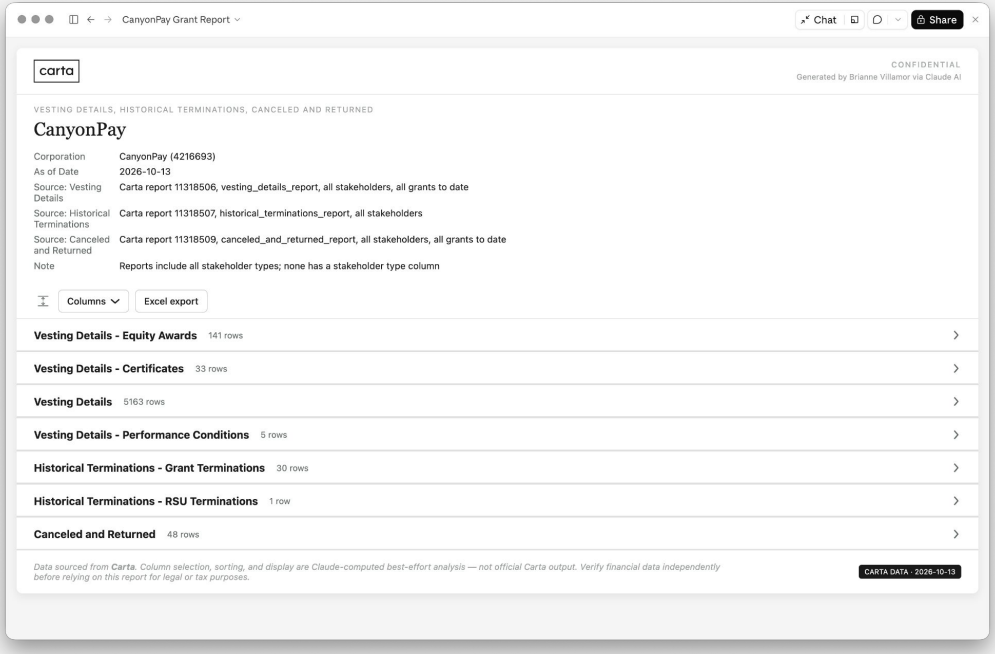
Example: Use /carta-reporting to show me a report that includes all vested and unvested equity awards currently on the cap table. I

2

Keep it if you will revisit it.

These will refresh each time you interact with them.

Leave it if it was a one-off.



Equity issuance demo

1

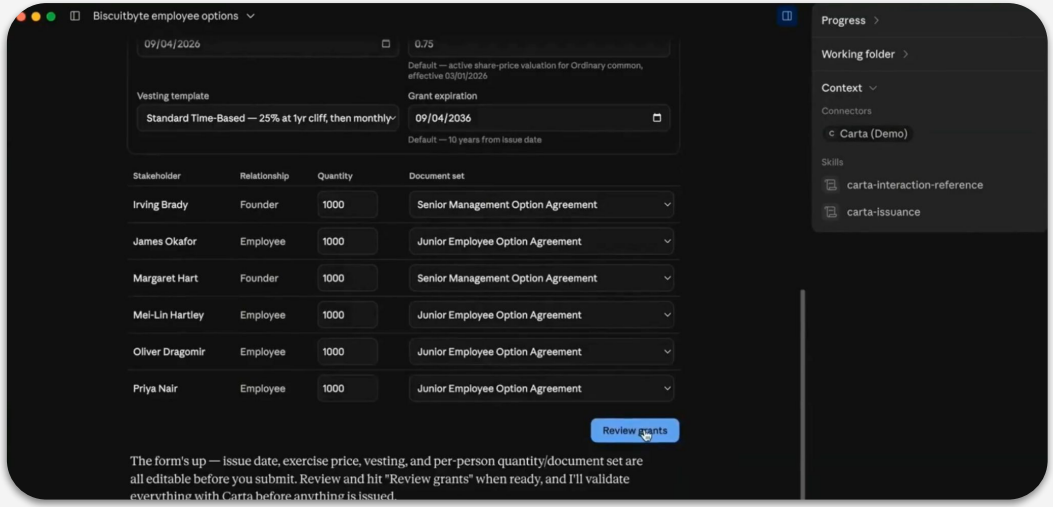
Type /carta-issuance and describe the grant(s) or upload a spreadsheet

Example: Issue 1,000 ISOs to [Employee 1].

2

Review the draft before anything is created

Vesting, exercise price and/or items like board approval pre-fill from your company data.



Wrap up: 5 principles to leave today with

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1. **Claude is a word calculator, don't ask it to do math**

   Claude is a new computer chip, using words as the input instead of numbers. Use Claude for judgment, summarization, and reasoning, and ask Claude to write scripts using traditional code for tasks requiring predictable data parsing or validation

2. **Give Claude the context and goal, not the steps in between**

   Don't write step-by-step instructions and expect Claude to follow them in order. Instead, allow agents to find their own solution, not the solution that works best for humans. Define your objective and let Claude find the path.

3. **Always have Claude site the sources**

   This will help save you time and give you confidence in the answers Claude is providing for you. Pull the data first, then reason on it.

4. **Use artifacts to make pulling data through Claude faster, cheaper, and more reliable**

   The most consistent question we get from clients is how to guarantee Claude provides accurate answers to user questions. Artifacts are one of the most effective solutions - create an artifact, check the data, know it will be right next time

5. **If outputs miss the mark, ask Claude why**

   Moving to AI-driven processes means your first step to diagnose errors is asking Claude what it did, why, and why it got the answer wrong. Often this single question is enough to uncover or even fix the error.


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