



Carta

Carta allows private companies – from formation to IPO – to manage their equity electronically with the participation of their shareholders, employees, auditors, and legal counsel. With Carta, your company legally issues electronic stock option grants, and other securities. From collecting signatures to transferring funds, Carta creates a single source of truth for all things related to your company's equity.



Why use Carta?

Single source of truth: With all equity transactions and information in Carta, the cap table stays up to date with less effort. Every security is linked to the transaction that created it.

No more paperwork: Employees and investors can accept electronic securities, exercise options, and track vesting schedules, all in Carta. Issue equity electronically, automate cap table management, process ACH exercises, close financings, and run liquidity programs

Built-in compliance: Carta offers tax forms, expense accounting, and 409A valuation services.

partners@carta.com



Carta Plans and L2 Counsel Discounts

Free access to Carta Launch

Companies with less than \$1M in funding and less than 25 stakeholders can get onboarded to Carta's free plan, Carta Launch. Receive the 10% L2 Counsel discount when you upgrade to a premium plan.

Carta Premium Plans

Receive a 10% first year discount and waived implementation fees.

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Carta Plans and L2 Counsel Discounts

Launch	Starter	Growth	Scale	IPO Ready
Cap table management for recently incorporated startups	Basic equity management and 409A valuations for early-stage startups	Equity management plus advanced planning and compliance features	A complete equity management solution for late-stage companies	Advanced equity management, with features & services to prepare you for liquidity, M&A, and IPO
Talk to your lawyer about access to free basic cap table management for companies with up to 25 security holders and up to \$1M raised.	<ul style="list-style-type: none">✓ 409A valuations✓ Cap table management✓ Electronic securities✓ Board consents	<ul style="list-style-type: none">✓ Everything in Starter✓ Form 3921✓ Scenario modeling✓ Investor updates✓ Board meeting management	<ul style="list-style-type: none">✓ Everything in Growth✓ ASC 718 expensing✓ Rule 701 management✓ Payroll tax integrations - Beta✓ Report builder	Talk to our specialists about a custom plan that meets your support, compliance, tax, and reporting needs.

How to get started

Please contact your L2 Counsel Representative to get you onboarded to Carta or contact partners@carta.com to learn more.