



CARTA PLANS

A plan for every company, from formation through IPO

Over 12,000 customers rely on Carta's equity management platform, valuations, and services.

We work with every customer to find a price, plan, and solution to fit your business.

Pricing is based on stakeholder count, cap table complexity, and plan.

Launch

Basic cap table management for pre-seed companies

- Talk to your lawyer about access to free basic cap table management for companies with up to 25 security holders and \$500k raised.

Starter

Basic equity management for early-stage startups

- ✓ **Standard 409A valuation**
Get valuations from our analysts, who leverage software to deliver fast, accurate, audit-ready 409As.
- ✓ **Cap table management**
Cap tables update with every transaction, so your equity information stays accurate.
- ✓ **Electronic securities**
Issue electronic securities to stakeholders, who can accept and exercise securities on Carta.
- ✓ **Board consents**
Send option grants and 409A valuations to your board for approval on Carta.

Growth

Starter + additional compliance and planning features for growing companies

- ✓ **Scenario modeling**
Plan for future financings with waterfall and pro forma modeling.
- ✓ **Form 3921**
Generate and distribute Form 3921s for all employees who have exercised options.
- ✓ **Board meeting management**
Make Carta the single source of truth for board meeting documents, agendas, and minutes.
- ✓ **Investor updates**
Send shareholders updates and track who has viewed your message.

Scale

Growth + integrations to streamline equity compensation at scale

- ✓ **Expense reporting**
Easily expense and disclose stock-based compensation as defined by ASC 718.
- ✓ **Rule 701 management**
Securely deliver Rule 701 special disclosures to stakeholders.
- ✓ **Payroll tax integration - Beta**
Sync data from your payroll systems to more accurately calculate tax withholdings.

IPO Ready

Scale + features and services to prepare you for liquidity, M&A, and IPO

- Talk to our specialists about a custom plan that meets your support, compliance, tax, and reporting needs.



ADD-ON FEATURES & SERVICES

Customize your plan

We offer additional features and services that you can add to our 5 standard plans.



Liquidity programs

Custom tender offer programs, leveraging Carta software and our team of equity experts.



Complex 409A

C-corps with straightforward equity structures need a Standard 409A valuation. Other equity structures require a Complex 409A.



Priority support

Dedicated support to make sure that you get the most out of Carta.



CARTA PLAN DETAILS

Features and services by plan

Cap table management	Launch	Starter	Growth	Scale	IPO Ready
Cap table	✓	✓	✓	✓	✓
Electronic securities	✓	✓	✓	✓	✓
Electronic exercising	✓	✓	✓	✓	✓
Security holder management	✓	✓	✓	✓	✓
Transactions auto-update your cap table	✓	✓	✓	✓	✓

Compliance	Launch	Starter	Growth	Scale	IPO Ready
Standard 409A valuation		✓	✓	✓	✓
Standard 409A refreshes for material events		✓	✓	✓	✓
409A audit support		✓	✓	✓	✓
Complex 409A valuation		Add-on	Add-on	Add-on	Add-on
ISO disqualification check		✓	✓	✓	✓
Account audit reports		✓	✓	✓	✓
Form 3921			✓	✓	✓
ASC 718 expense reporting				✓	✓
Rule 701 management				✓	✓

Equity reporting	Launch	Starter	Growth	Scale	IPO Ready
Capitalization report with drafts	✓	✓	✓	✓	✓
Equity plan balance report		✓	✓	✓	✓
Rule 701 analysis worksheet		✓	✓	✓	✓
Investor audit-confirmation service		✓	✓	✓	✓
Exercise reports		✓	✓	✓	✓

Scenario modeling	Launch	Starter	Growth	Scale	IPO Ready
Waterfall modeling			✓	✓	✓
Breakpoints			✓	✓	✓
Sensitivity analysis			✓	✓	✓
Payouts			✓	✓	✓
Financing round modeling			✓	✓	✓



Financial transactions

	Launch	Starter	Growth	Scale	IPO Ready
Option exercises	✓	✓	✓	✓	✓
Repurchases	✓	✓	✓	✓	✓
Stock transfers	✓	✓	✓	✓	✓
Tender offers				Add-on	Add-on

Shareholder management

	Launch	Starter	Growth	Scale	IPO Ready
Permissions - internal & external	✓	✓	✓	✓	✓
Grant cap table access	✓	✓	✓	✓	✓
Option grant & exercise approvals	✓	✓	✓	✓	✓
Board consents	✓	✓	✓	✓	✓
Board meeting management			✓	✓	✓
Board member platform	✓	✓	✓	✓	✓
Employee platform	✓	✓	✓	✓	✓
Investor platform	✓	✓	✓	✓	✓
Law firm platform	✓	✓	✓	✓	✓
Send and track investor updates			✓	✓	✓
Payroll tax integration - Beta				✓	✓

Liquidity

	Launch	Starter	Growth	Scale	IPO Ready
Tender offer platform & programs				Add-on	Add-on
Tender offer account manager				Add-on	Add-on

Services

	Launch	Starter	Growth	Scale	IPO Ready
Dedicated, priority support	Add-on	Add-on	Add-on	Add-on	Add-on
Opt-in Beta program			✓	✓	✓
Relationship manager				✓	✓
Equity admin team			Add-on	Add-on	Add-on