



Partner Newsletter

June 2022

Product Updates

New offering - Carta Tax Advisory for Employees

With Tax Advisory by Carta, your clients can help their employees understand the true value of their equity package. This offering provides your clients' employees with quarterly educational programs as well as unlimited 1:1 sessions with a tax advisor to walk through different equity exercising scenarios and potential tax implications.

This, alongside our free [Equity 101](#) education series, will help your clients understand the basics of stock ownership.

Reach out to us at partners@carta.com to learn more!

In Beta - Token Tracking: Alternative Asset and Transaction Platform

Your fund clients can now centralize all crypto holdings via Carta's general ledger. This will allow you to automate valuation and investment updates and consolidate staking activities and audit on-chain and off-chain transactions in real-time. You can also track conversions and lockup periods for convertible notes and tokens, and report staking income and other DeFi protocols.

If you would like to demo the product and provide feedback, please email partners@carta.com.

Token Valuations

Carta offers token valuations for the following purposes:

- Tax planning related to rewarding tokens to employees as a form of compensation (similar to a 409A)
- Establishing a strike price for token warrants

Pricing starts at \$3000 per token valuation, with turnaround times of approximately 5-7 business days. To start the token valuation process or for more details, reach out to us at partners@carta.com.

Carta Total Rewards is now available!

With Carta Total Rewards, employers can help retain talent by sharing the full value of their employees' total compensation package. Companies can keep attrition costs down by showing employees how much they've invested in them and how they can grow as the company grows. [Show employees their value with Total Rewards](#)

Program and Enablement

Carta Platform Trainings

We are now offering biweekly office hours to help answer your questions on how to use the Carta platform. An expert from Carta will show you how to access reporting, manage stakeholders, modify vesting schedules, and much more. Come with your questions! | [Sign up](#)

Join Our Carta's Customer Community: Around the Table

Have you joined [Around the Table](#), Carta Customer Community for Paralegals? By joining the community, you'll be able to:

- Access an entire community of equity professionals and law firm power users
- Share Carta tips & tricks
- Ask for support from peers when facing a challenge
- Expand your professional network
- Share ideas to improve the Carta platform

[Join here](#)

Join our Private Equity Roundtable

In our inaugural session, a select group of partners will discuss the rise of shared-ownership programs in PE. This shift has been recently fueled by the founding of Ownership Works, a non-profit promoting employee equity across the ecosystem.

Topics will include:

- Trends in PE ownership models
- Streamlining equity administration
- Impact of the macro environment on this shift

[Set up a call](#) to learn more, or register for our session directly [here](#).

Check out our latest Policy Brief

Get the latest news from our [policy brief](#). Recent highlights include:

- SEC releases regulatory agenda signaling action on private markets, equity market structure, and ESG. Expect continued focus on crypto oversight using existing authority and enforcement tools
- Majority Leader Chuck Schumer and Sen. Joe Manchin are working to finalize a smaller version of the Build Back Better Act, focused on prescription drug reform, climate, and deficit reduction. Qualified small business stock (QSBS) remains in jeopardy and we are engaged in preserving the treatment
- Congressional leadership narrows negotiation parameters on U.S. competition bill, aiming to pass a bill by August

Round sizes and valuations are down: What to expect

Carta's private market data suggests that Series A, B, and C companies' round sizes and associated valuations are trending downward in 2022. Watch the recording of our recent virtual panel where we discuss these market trends and how founders and investors can navigate them. [Watch the recording](#)

Modernizing the 83(b) filing process

Carta is simplifying how 83(b) filings are done. We are changing the manual, time-intensive, and uncertain process to enable customers to complete it entirely on our platform. First, we changed the IRS position: Carta and its [coalition partners](#) successfully obtained temporary relief from the IRS to allow electronic signature.

Now, Carta is preparing to launch a feature that allows customers to e-sign their 83(b) and auto-submit the physical copy to the IRS. This enables employee-owners and companies to complete and track this filing, all without friction.

Contact us at partners@carta.com to learn more.

Other News from Carta

Onboard any client to Carta through your law firm dashboard

Don't forget—you can easily onboard any client to Carta through your law firm dashboard on the Carta platform. [Add your clients](#) to either the free Launch plan (for companies with <\$1M raised or 25 or fewer stakeholders) or to a paid plan (for companies over the Launch threshold, or who are looking for a [paid feature](#)).

Carta Investment Management Solutions

Have a venture investment fund practice? We have a [full suite](#) of services and experts to support fund launch, LP management, fund administration, portfolio company valuations, and more. Streamline your client onboarding process and receive referrals for new clients.

Carta for Private Equity and LLC

Our equity management platform also provides offerings for Private Equity and LLC companies. This dedicated platform expands equity & ownership to LLCs, Private Equity portfolio companies, and other non-venture backed businesses.

[Set up a call](#) to learn more

Coming Soon - Interactive Offer Letters by Carta!

Your clients can win top candidates by communicating the full value of a job offer — from salary to equity to benefits, and everything in between.

The fully interactive offer letter will:

- Illustrate the full value and future upside of a candidate's offer
- Get candidates excited about the company and people they're about to work with
- Help hiring teams make every interview count

For questions or to refer a deal, please reach out to partners@carta.com.