



Certification Program FAQs

How is the training program structured?

The training consists of three tiers: Proficient (Level 1), Premier (Level 2), and Expert (Level 3). Details are provided below:

Level	Content	Length	Requirement	Recommended Audience
Proficient	How to onboard a client; Managing account users; Drafting/issuing/modifying certificates; Transactions; Manage stakeholders (1/3); Reports; 409A page;	2 hours	Proficient level assessment	Paralegals and associates
Premier	Reported issues; Add/amend an equity plan; Draft/issue equity awards; Option exercises; Manage Warrants/Note blocks (1/2); Manage stakeholders (2/3) Prerequisite: Proficient Level	2 hours	Premier level assessment	Paralegals admins
Expert	Account health checks; Modifying vesting schedules; Canceling options; Manage Warrants/Note blocks (2/2); ISO 100k dashboard, and more Prerequisite: Proficient and Premier Levels	2 hours	Complete a demo with a support rep	Paralegal superusers

What is the format of this training?

For phase 1, we will be hosting trainings via live webinar. For phase 2 (tentatively scheduled for November 2022), we will make the trainings available on-demand via a Learning Management System.

What kind of resources will be available to me as part of the certification program?

The training will be held via a live Zoom webinar. After the session, we will provide you with the following resources:

1. Link to the recording
2. Cheat sheet with links to demos of common workflows, support articles, and more

3. Program guide with details about the Carta Certification Program as a whole

How will certifications be verified?

Carta will keep track of all badge recipients. Paralegal managers will be able to reach out to Carta to verify if a user has completed the training.

Will the Carta-certification remain valid if I move to a different company?

Yes, please email partners@carta.com if you move to a different company. We will be able to update your Carta certification accordingly.

How can I promote my Carta certification?

Once you have passed an assessment for a full course, you will receive a Carta Certification Badge for that level. You will be able to promote your achievement via LinkedIn, your email signature, your resume, and on the Carta platform.