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Carta Certification Program for Law Firm Users

August 2022

A word from our lawyers

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The [Partner Certification Program](#) offers law firm users free training on Carta capabilities to empower them to use our solutions to their fullest potential.

Why take the Carta Certification?

Take the training to:

Understand the tools and workflows to get things right - the first time

Complete the assessment to:

Demonstrate your expertise to clients and your firm so you can set yourself up for career success.

Gain a competitive edge by:

Promoting your Carta certification on social media, in your email signature, on your resume and more. Your certification will even show up on the Carta platform!

Certification Program Structure

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

Format

Phase 1: Live webinar | Launching October 2022

- Interactive webinar training format
- Up to 20 attendees per session

Phase 2: On-demand | Launching November 2022 (tentative)

- Consist of short video tutorials, readings, and interactive quizzes
- User can start, stop, and come back to training on their own time

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