

# 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)  <b>Prerequisite:</b> 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  <b>Prerequisite:</b> 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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