

Meet Your Carta Team



Onboarding Manager

Your Onboarding Manager is responsible for getting you up and running on Carta. They'll make sure your entities are set up correctly in the Carta platform, walk you through how to use your GP Portal, and migrate any historical accounting information. If you're closing with us, they'll also set you up with our closings tool for your first capital call.



Fund Administration Team

After you've finished onboarding, you'll be introduced to your dedicated fund accountant and Fund Admin Team, who will provide you with direct access to top-tier resources and expertise to optimize your business operations. They're responsible for managing your back office accounting, which includes maintaining your books, preparing timely financial reports, producing capital calls and distribution notices, assisting with audit and tax inquiries, and handling other critical fund accounting tasks.



Account Executive

If you're interested in exploring additional Carta products or services, your account executive is the person to ask. Their job is to help you find the solutions that make your life easier and drive your fund forward.



Support Team

Our Support Team is here to assist you and your LPs. Visit their [dedicated support site for investors](#) or for help troubleshooting any technical issues, you can reach them at investorservices@carta.com or (801) 890-7542 between 6:30am-5pm PST.