

# Onboarding to Carta Fund Tax is simple

Taxes can get complicated, but we're here to make it simple. From SPVs to international holdings, Carta has the expertise to make tax season seamless.

With most traditional fund administrators, you need a separate tax preparer—which means back-and-forth between your preparer and your fund admin, a tangle of email threads, and repeated questions every tax season. You're paying multiple parties, and stuck doing the work of the middle man.

When you use Carta for fund tax, the data required to prepare 1065s and K-1s all lives in the same place. The seamless flow of data means fewer errors, less busywork for you, and more on-time delivery of tax returns and K-1s.

## Before

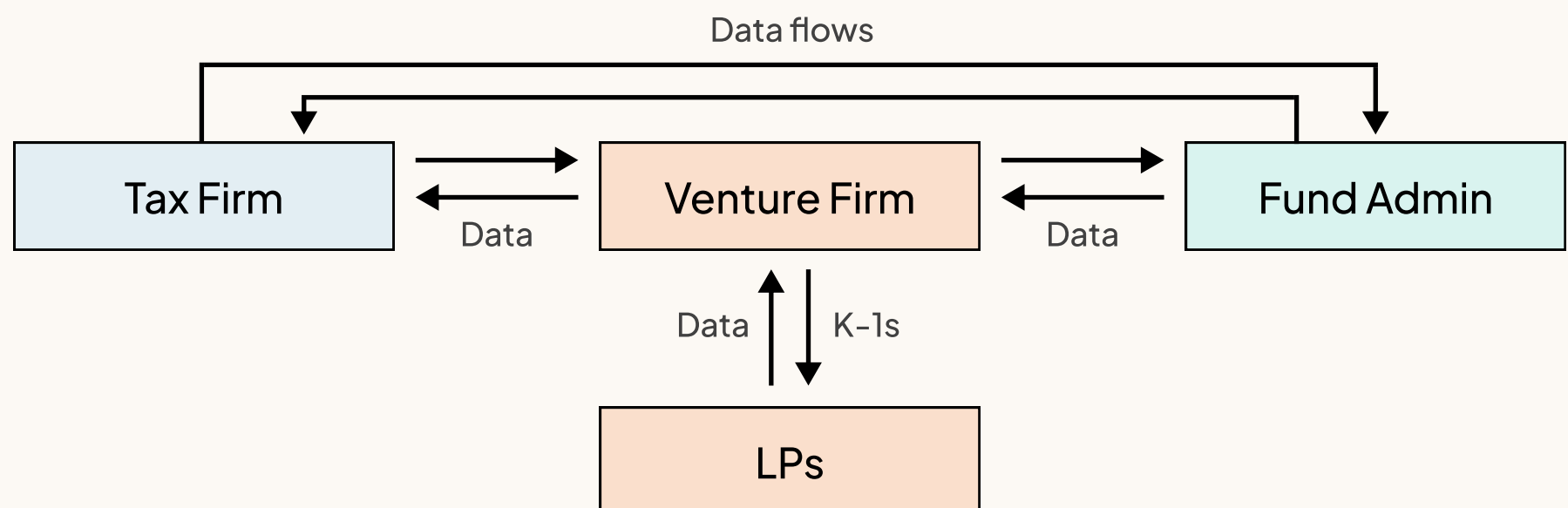
### Traditional modes of tax prep lead to familiar issues

- ✘ Late delivery

Slow K-1 delivery from back and forth between providers
- ✘ Low visibility

Hard to track progress and relevant data and documents
- ✘ Errors

From manual inputs across siloed systems and teams

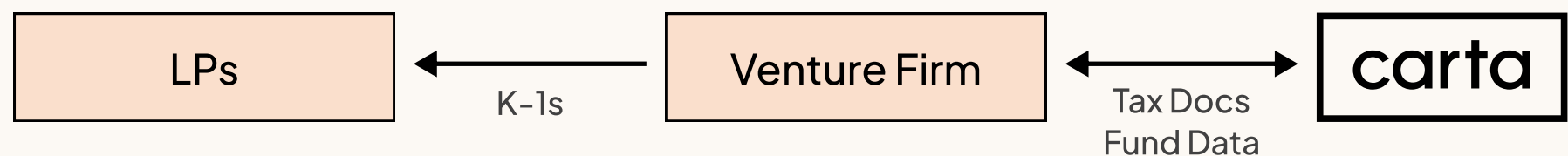


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## After

### Carta streamlines end of year with fast, accurate returns

- ✓ **K-1s delivered on time**  
Timely delivery to LPs to prevent bottlenecks
- ✓ **Organized oversight**  
Track all statuses and documents in one place
- ✓ **Greater precision**  
Pre-filled forms to minimize errors and restatements



## Onboarding with Carta is simple

If you already work with Carta for fund administration, getting started for fund tax is simple.

### Getting started with fund tax:

- 1 Upload your prior year tax return in Carta.
- 2 Fill out the tax questionnaire to confirm important information.
- 3 Approve your financials, after your fund admin team has already filled in the gaps.
- 4 That's it! Now your tax team starts working on your return.

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