

# Meet the Carta Fund Tax Experts

Carta's Fund Tax team marries decades of tax expertise with unique insight into your firm and its specific needs.

Traditional fund administrators don't do taxes, and they require GPs to coordinate with separate tax preparers. That means endless back-and-forth, high coordination costs, and too much time dedicated to admin, when you could be considering new investments.

When you consolidate Carta Fund Administration and Fund Tax, you gain real-time visibility, faster K-1 delivery, and accurate returns, powered by your centralized data.

The Carta fund tax team is a dedicated group of over 30 tax experts who built their careers at some of the most respected global accounting and tax advisory firms before bringing their deep expertise to Carta.

Meet some of the experts who make tax season a lot less...taxing.

## Expertise you can trust



**Chad Willbur**  
Head of Auditable Reporting Services

Chad has 25 years of professional experience, including eight years at Carta. His prior work at firms such as Andersen Tax and Quist Valuation provided experience across a range of tax and valuation matters. Currently, he contributes at a national level as a member of the American Institute of Certified Public Accountants (AICPA) task force, contributing to the development of professional standards and industry guidance.



**Lili Zhou, CPA**  
Tax Senior Manager

Lili has 19 years of professional experience in tax, including work at KPMG. With a strong background in partnership taxation, private equity, and hedge fund clients, she has developed deep expertise in tax compliance, planning, and review processes for complex investment structures.



**Craig Dittman, CPA**  
Tax Senior Manager

Craig has 16 years of experience in tax, with a focus on management, planning, and consulting services. His prior experience at Deloitte provided a foundation in serving complex client portfolios. As a licensed CPA, Craig applies a high standard of technical accuracy and compliance to his work.

## Working with Carta Fund Tax

Carta has helped funds and firms of all sizes, from emerging managers to firms with \$2.5B assets under management. Our team is ready to help, no matter your fund's needs. Carta's Fund Tax team has deep experience navigating the complexities of international tax compliance, offering tailored support and guidance to ensure your fund meets regulatory requirements across multiple jurisdictions.

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Here are some of the things our customers have to say about us:



**EMERGENT**  
VENTURES

**Year Founded:**  
2016

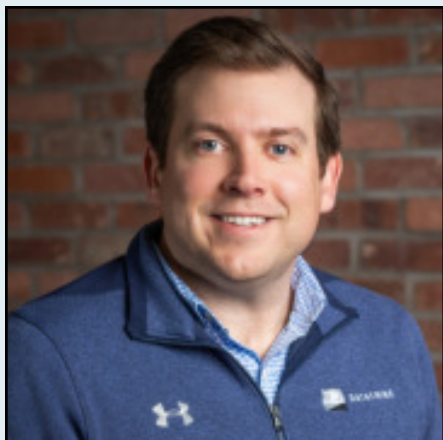
**Headquarters:**  
San Mateo, California

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“We appreciate that Carta’s tax team is knowledgeable,” says Ankur Jain, managing partner at Emergent Ventures. “When we have questions, we want to feel certain that we can trust external guidance and opinions. Working with experienced tax professionals means we don’t cycle through multiple verifications.”

“When we used a separate tax firm from our fund administrator, there was always push and pull on timelines. Now, Carta owns this for us, and we can balance internal and compliance deadlines all year because information is always flowing. I don’t have to do anything: Carta has our master data and automatically syncs it between administration and taxes.”

**Ankur Jain**  
Managing Partner  
Emergent Ventures



 **DATATRIBE**

**Year Founded:**  
2015

**Headquarters:**  
Washington, D.C.

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“Having Carta as our fund admin and tax service has been a really big time saver for us. The platform enhances our reporting capabilities, including the look and feel of our documents,” says Matt Moran, Chief Financial Officer at DataTribe. “It’s been a seamless process. We can share portal access so investors can view their statements, financials, and tax information, while auditors can review full account activity and supporting documentation. It cuts down on back and forth.”

“A dedicated tax team with real-time access to your data can provide real-time analysis. This helps us think through things like book to tax differences, tax distribution potential, and estimated partner liability,” says Moran. “It’s an end-to-end approach because it flows from data we provide for fund administration which drives efficiency at tax time.”

**Matt Moran**  
Chief Financial Officer  
DataTribe