

## Features and services by plan

Cap table management	Starter	Growth	Enterprise
Cap table	✓	✓	✓
Electronic securities	✓	✓	✓
Electronic exercising	✓	✓	✓
Stakeholder management	✓	✓	✓
Transactions auto-update cap table	✓	✓	✓

Compliance	Starter	Growth	Enterprise
Standard 409A valuation	✓	✓	✓
Standard 409A refreshes for material events	✓	✓	✓
409A audit support	✓	✓	✓
Complex 409A valuation	Add-on	Add-on	Add-on
ISO disqualification check	✓	✓	✓
Account audit reports	✓	✓	✓
Form 3921		✓	✓
ASC 718 Expense Accounting			✓
Rule 701 management			✓

Equity Reporting	Starter	Growth	Enterprise
Capitalization report with drafts	✓	✓	✓
Equity plan balance report	✓	✓	✓
Rule 701 analysis worksheet	✓	✓	✓
Investor audit-confirmation service	✓	✓	✓
Exercise reports	✓	✓	✓
Custom reporting service		Add-on	Add-on

Scenario Modeling	Starter	Growth	Enterprise
Waterfall modeling		✓	✓
Breakpoints		✓	✓
Sensitivity analysis		✓	✓
Payouts		✓	✓
Financing round modeling		✓	✓

Financial transactions	Starter	Growth	Enterprise
Option exercises	✓	✓	✓
Repurchases	✓	✓	✓
Stock transfers	✓	✓	✓
Tender offers			Add-on

Shareholder management	Starter	Growth	Enterprise
Permissions - internal & external	✓	✓	✓
Grant cap table access	✓	✓	✓
Option grant & exercise approvals	✓	✓	✓
Board approvals	✓	✓	✓
Board meeting management		✓	✓
Board member platform	✓	✓	✓
Employee platform	✓	✓	✓
Investor platform	✓	✓	✓
Law firm platform	✓	✓	✓

## Liquidity

	Starter	Growth	Enterprise
Tender offer platform & programs			Add-on
Tender offer account manager			Add-on

## Services

	Starter	Growth	Enterprise
Dedicated, priority support			✓
Opt-in Beta program		✓	✓
Relationship manager			✓
Equity admin team		Add-on	Add-on