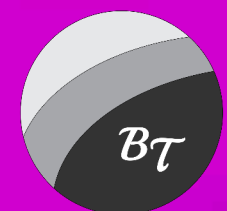


# Web3 Transfer Agent Depository

Explainer and Brief Technicals



Block Transfer



# Our Work

TAD3 solves a global problem best explained by [WhyDRS.org](https://www.whydrrs.org)

*More shares voted than exist  
in 73.2% of meetings.*

— Securities Transfer Association

n = 183

Founder John Wooten



## Incumbent tech limitations



# Replacing Monopolies

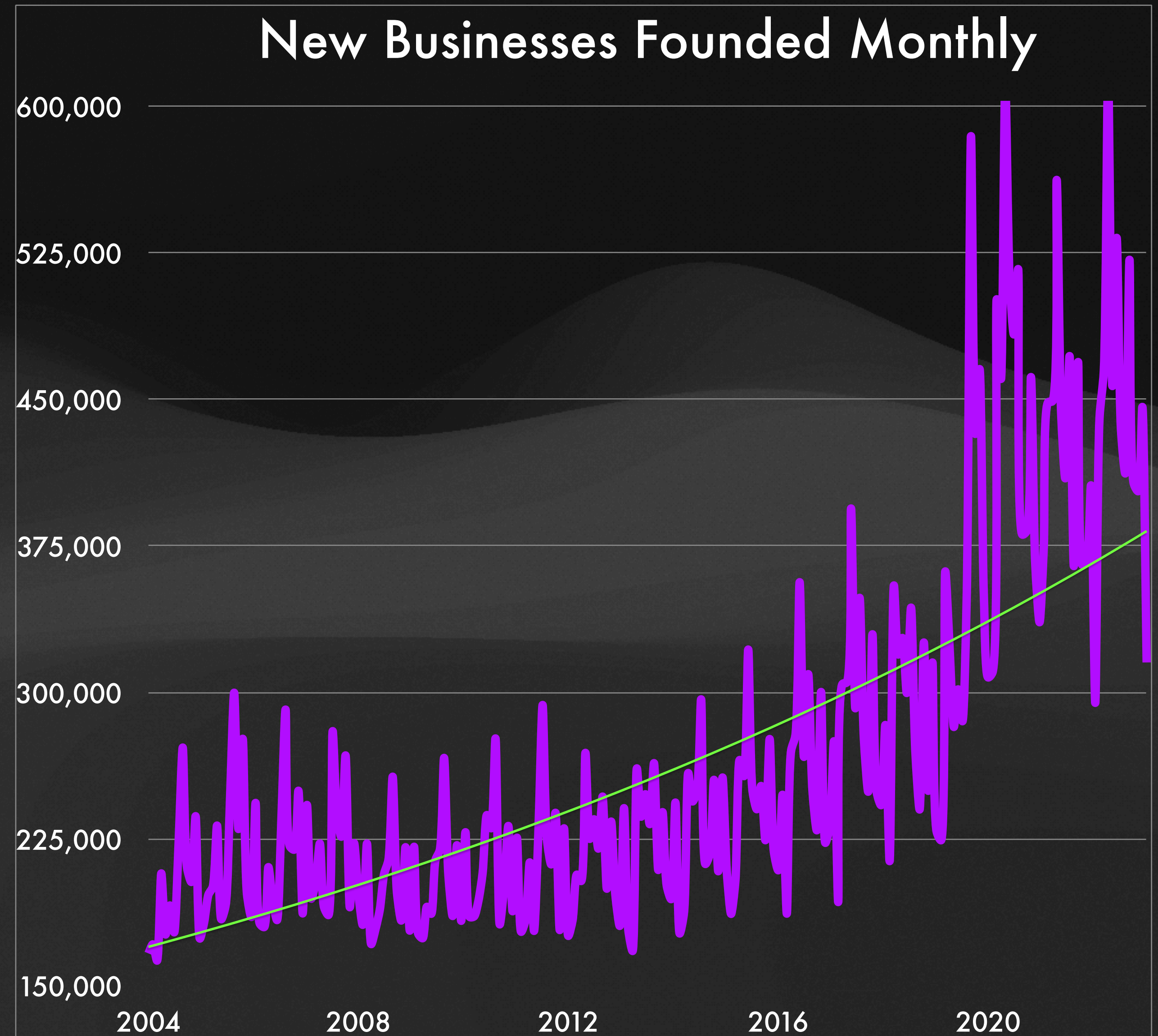
We are in the business of disrupting Wall Street





# Web3 Infrastructure for the next innovators

- **Less Job Security, More Ideas:** Over 400,000 startups founded per month—double legacy rates.
- **Problem Transforming Norms:** 41% of founders report adequate fundraising as their top challenge.
- **Minor Capital, Major Potential:** 79% of bootstrapped founders needed less than \$100,000, with 43% requiring less than \$10,000.





# Existing Solutions



**\$400,000**

**Leading Transfer Agent Annual Fees**



# 520 Hours

Average Annual Transfer Agent Paperwork

Based on interviews with 50 public American CFOs



## Scandals at leading competitor

“This might be the end of @cartainc as the trusted platform for startups.”

**Karri Saarinen**

founded first Finnish company funded by Y Combinator





# Introducing TAD3

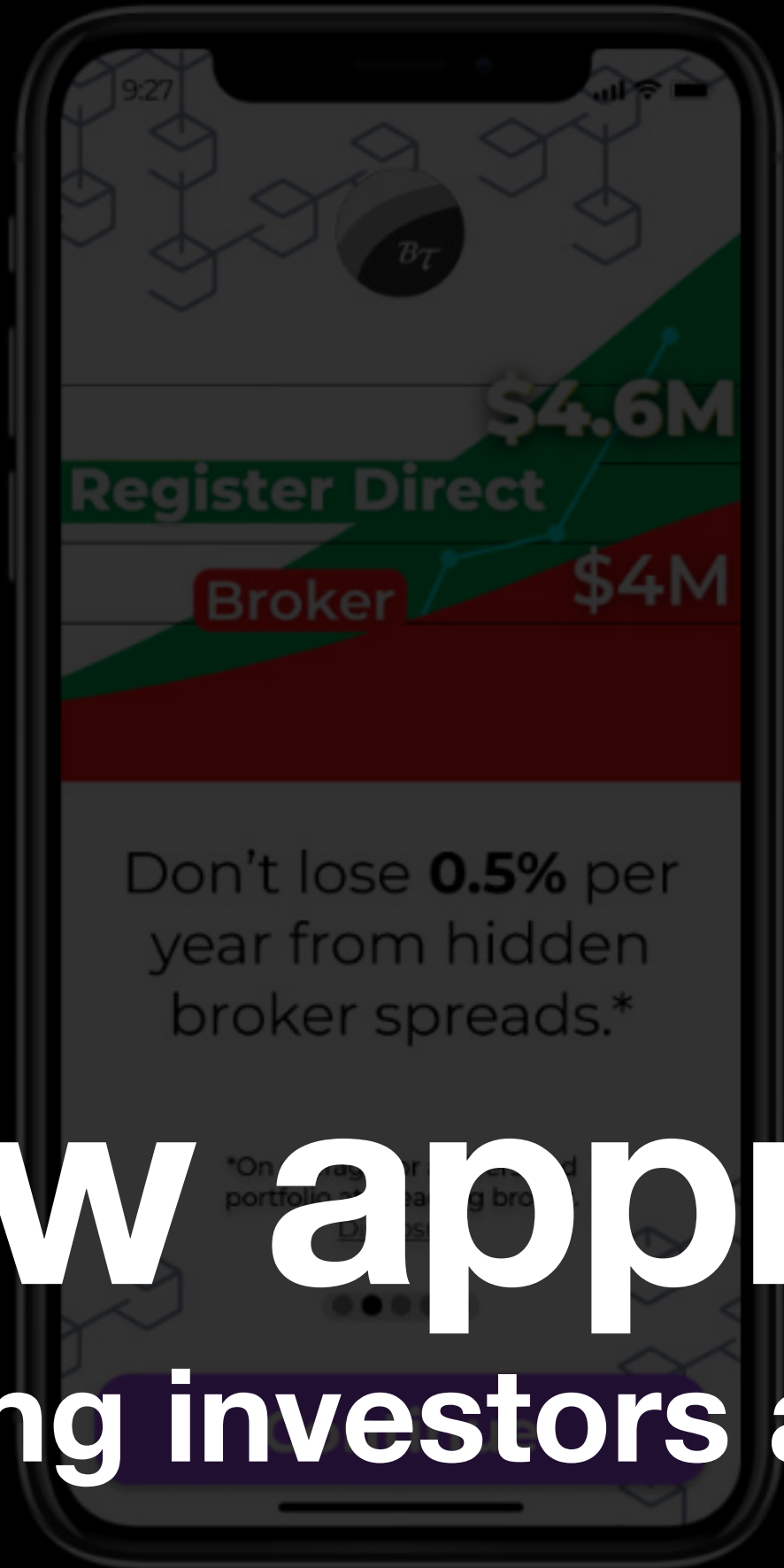




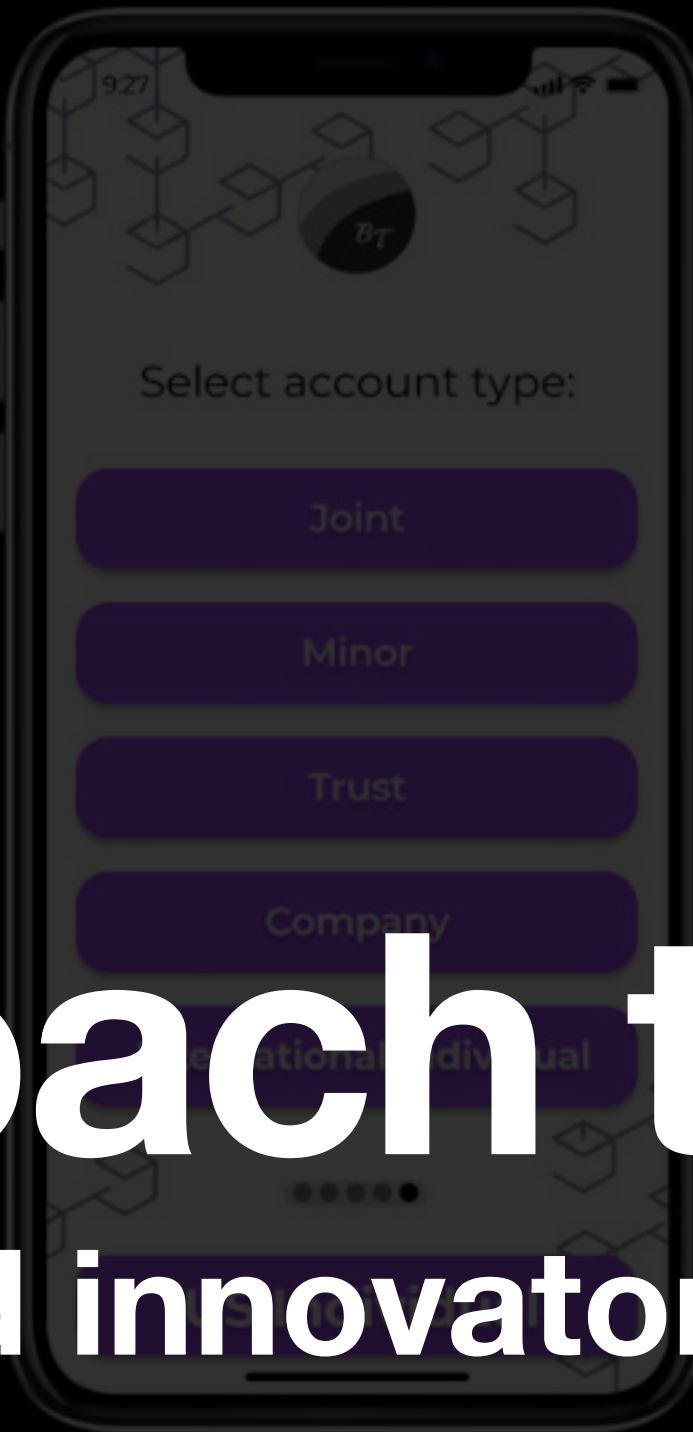
Investor



Explain problem



Open account from anywhere with government ID



Profit



# A new approach to securities

Connecting investors and innovators without costly brokers

Downloads app

[Demo](#)

Generate seed phrase



**Designed with best practices**

Company Account

Individual Account

Private Placement Holdings

Initial Offering Holdings

Reg A Offering Holdings

Reg CF Offering Holdings

Reg D Offering Holdings

Shelf Offering Holdings

Employee Stock Holdings

Insiders' Individual Accounts

Executives / Counsel

**Dynamo PII**

Full corporate PII record

Full individual PII record

Child PII record  
ID: CIK  
type: dspp.holdings  
(signers on chain imply rights)

Child PII record  
ID: parentID  
(use IDs attr for joint, ID = "joint")  
type: IRA

IRA

Roth IRA

Minor account

Joint account

### Managed Key / Issuer Account Configuration

- Generate vanity master company account, save secret key
  - Type = "\_issuer", ID = CIK
  - Add all affiliates as signers (manages affiliated tag)
    - Thresholds defined by CFO in *I.L.* via individual IDs
- Generate vanity keys for all sub-accounts
  - Get sub-account signer weights:
    - Master company account: 255
    - sub-account master key: 0
  - Modify all signers when master account change via *I.L.*

Find all accounts for a user with endpoint:  
<https://{HORIZON}/accounts?signer={pubKey}>

### Corporate Signers Thresholds

#### Company Master / Treasury

- High: Managed Signer
- Med: CFO, CEO, anyone designated by them
- Low: Affiliated insiders

#### Holdings Pools

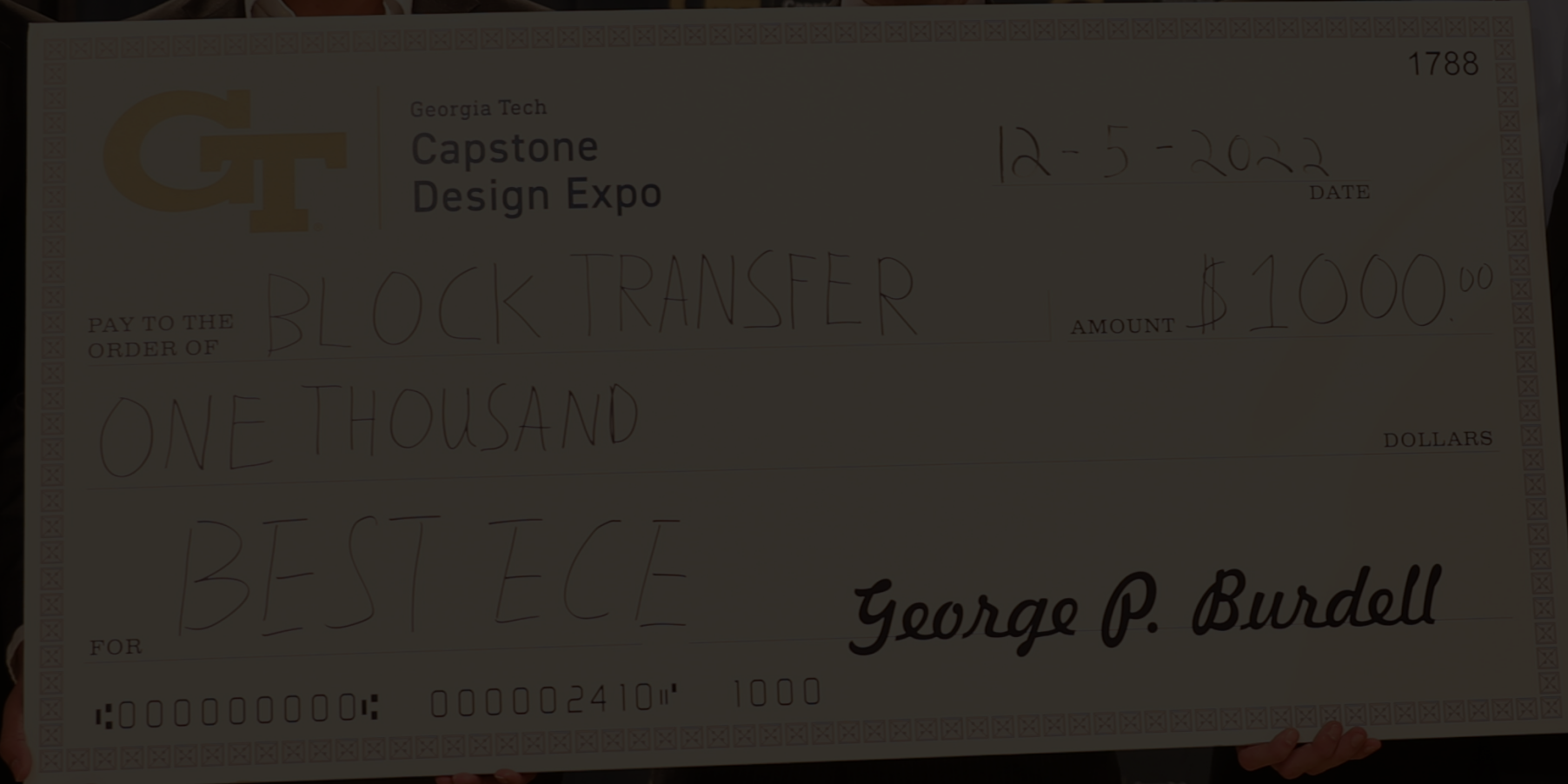
- High: Managed Signer
- Med: CFO, CEO, users designated

# Self-Custody

## Decentralized investor trust



Unique nonprofit structure



**Issuer Syndicate**  
Subsidizing small business growth



# Why Block Transfer a flat organization

- Timely history of deliverables
- Compliance-first approach
- Proactive investor support

