



Connect ChatGPT to Your MEXEM Account

A guide to connect your account and get started with ChatGPT.

About this service

What the ChatGPT connection does, and what it does not do.

This guide explains how to connect your MEXEM account to ChatGPT. Before you start, this page sets out what the service is, what it can and cannot do on your behalf, and the important points you should understand before connecting.

What this service is

The ChatGPT connection lets you link your MEXEM account to ChatGPT so you can ask questions about your portfolio in everyday language, look up market information, and have a draft trade instruction prepared for you to review.

MEXEM provides the connection to your account. ChatGPT is a separate service operated by OpenAI. MEXEM uses Interactive Brokers (IBKR) infrastructure to enable it, which is why you will see Interactive Brokers or IBKR during sign-in. This is expected, and you remain a MEXEM client throughout.

What it can do

- Answer questions about your connected account - positions, balances, allocation, profit and loss, open orders and recent activity.
- Look up market information available to your account, including prices and historical data. Depending on your subscription, prices may be real time or delayed.
- Prepare a draft trade instruction, which then appears in the MEXEM app for you to review.

What it cannot do

- It cannot place, submit, amend or cancel any order. Every instruction stays a draft until you submit it yourself.
- It cannot move money, make withdrawals or transfers, or change any setting on your account.
- It cannot give investment advice or a personal recommendation, and does not assess whether a trade is suitable for you.
- It cannot act on its own or on a schedule. It only responds when you ask it something.

Things to keep in mind

- Using the connection is entirely optional. Your MEXEM account works exactly the same without it.
- You choose which accounts to connect, and you can disconnect or revoke access at any time (see the last page of this guide).
- You remain responsible for every order you submit, including any that started as a ChatGPT draft.

Before you connect

Connecting shares your account data with a third party.

You are sharing your account data with OpenAI

Connecting ChatGPT authorises OpenAI to access your account data, including positions, balances and trading activity, and to process it outside the European Economic Area. MEXEM cannot retrieve or delete data once shared. OpenAI acts as an independent data controller under its own terms. Connecting is optional and you can revoke access at any time in Client Portal.

Good practice

- Grant access only to the accounts you actually need - you can select which accounts to expose during sign-in.
- Disconnect when you no longer use the connection.
- Your rights over the personal data MEXEM holds are set out in MEXEM's Privacy Policy.

Connect your account

Start in ChatGPT and add the Interactive Brokers integration.

Before you begin

Have your IBKR login credentials and two-factor authentication method ready.

1 Open Settings

Open your profile menu and select **Settings**.

2 Open Plugins

Select **Plugins**, then **Browse plugins**.

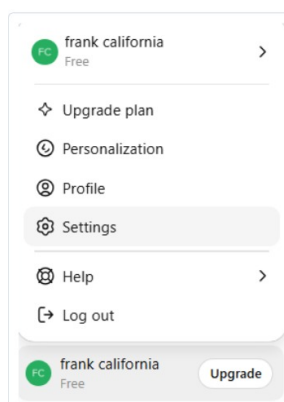
3 Find Interactive Brokers

Search for **Interactive Brokers (IBKR)** and select the + button.

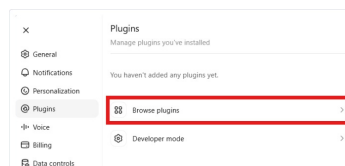
4 Start the connection

Select **Sign in with Interactive Brokers (IBKR)**.

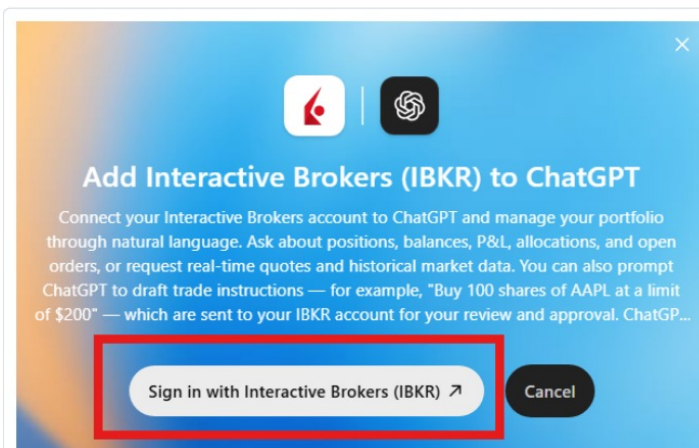
SETTINGS



BROWSE



ADD IBKR



You're in control. ChatGPT always respects your training data preferences, and is limited to permissions you've explicitly set.

Apps may introduce elevated risk. ChatGPT is built to protect your data, but attackers may attempt to use ChatGPT to access your data in the app, or use the app to attempt to access your data in ChatGPT.

Data shared with this app. By adding this app, you allow it to access: (1) basic information typically shared when you visit a website, such as your IP address and approximate location ([learn more](#)), and (2) a summary of your recent context and intent within ChatGPT. Our policies require that apps only access relevant content to respond to your requests. This data will be used as described in the app [Terms of Use](#) and [Privacy Notice](#).

Sign in to your trading account

Sign in through IBKR and select the MEXEM account you want to connect.

5

Sign in

Choose **Live** or **Paper**, then enter your IBKR credentials.

6

Choose your account

Select the account you want to connect.

7

Review access

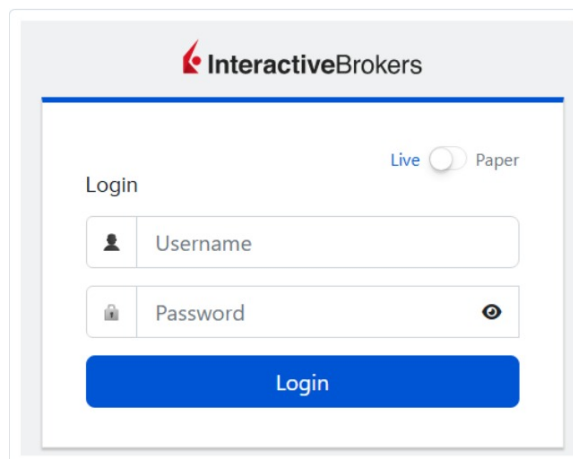
Review the requested access.
Select **I Agree** to continue or **Deny** to stop.

8

Confirm the connection

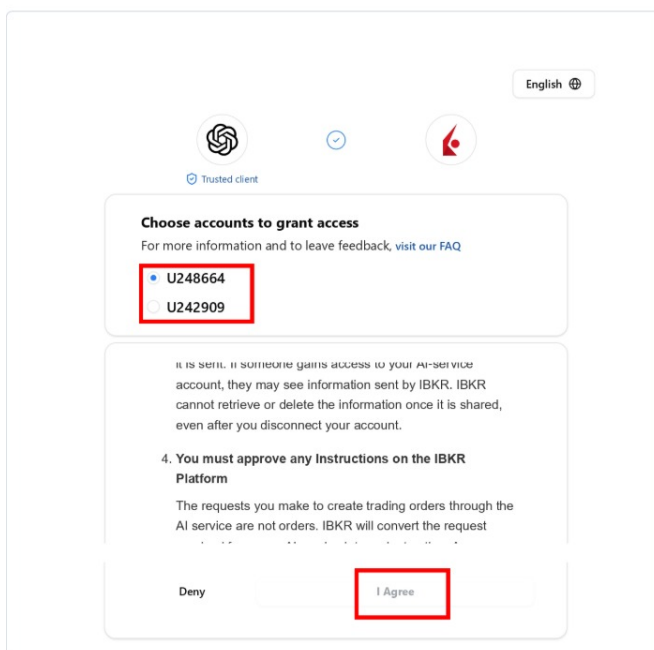
Return to ChatGPT and confirm that **Interactive Brokers** appears as connected.

IBKR LOGIN



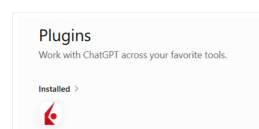
The IBKR Login interface shows the InteractiveBrokers logo at the top. Below it, there are two radio buttons for 'Live' (selected) and 'Paper'. A 'Login' label is positioned above the input fields. There are two input fields: 'Username' with a person icon and 'Password' with a lock icon and an eye icon to toggle visibility. A blue 'Login' button is at the bottom.

ACCOUNT CONSENT



The Account Consent interface shows a 'Trusted client' status with icons for ChatGPT, a checkmark, and the IBKR logo. A language selector shows 'English'. The main section is titled 'Choose accounts to grant access' with a link to 'FAQ'. Two account IDs are listed: 'U248664' (selected with a blue dot and highlighted with a red box) and 'U242909'. Below this, a warning states: 'It is sent, if someone gains access to your AI-service account, they may see information sent by IBKR. IBKR cannot retrieve or delete the information once it is shared, even after you disconnect your account.' A section titled '4. You must approve any instructions on the IBKR Platform' explains that AI requests are converted to trading orders. At the bottom, there are 'Deny' and 'I Agree' buttons, with 'I Agree' highlighted by a red box.

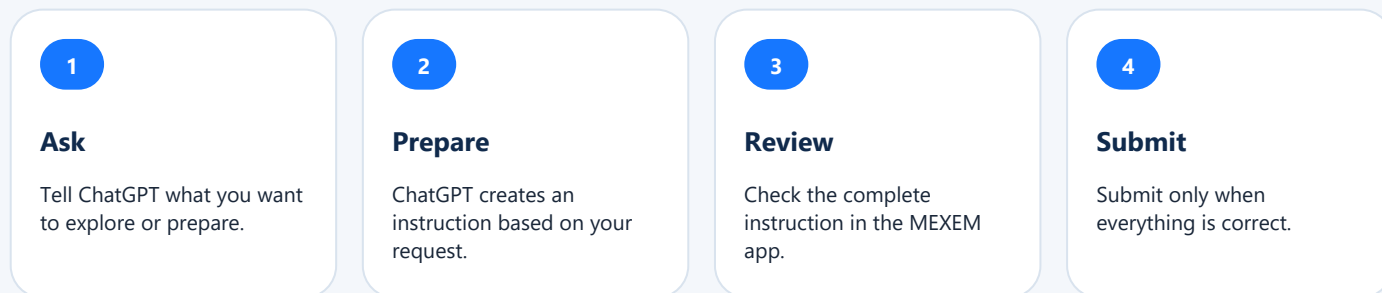
CONNECTED STATUS



The Connected Status interface shows a 'Plugins' section with the text 'Work with ChatGPT across your favorite tools.' Below this, there is an 'Installed' status with a red IBKR logo icon.

From conversation to order

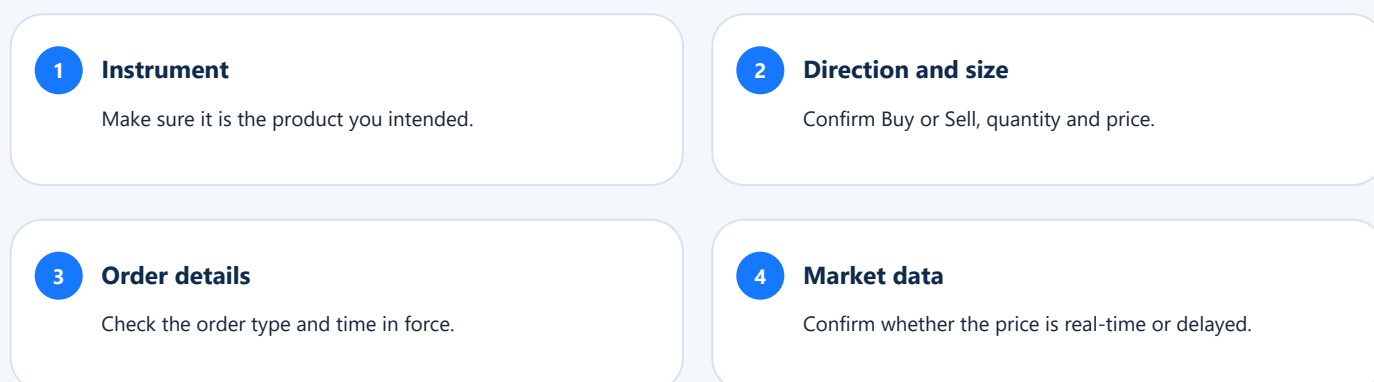
ChatGPT can prepare an instruction. You decide whether it becomes an order.



ChatGPT is a third-party AI service

ChatGPT is operated by OpenAI, an independent third party. Its output is not produced, verified or endorsed by MEXEM, is not investment advice and may be inaccurate or incomplete. You are responsible for checking every instruction before you submit it.

Always check before you submit



You remain in control

ChatGPT can prepare a draft, but it cannot submit an order for you. Continue only when the complete instruction shown in the MEXEM app matches what you intended.

Review your instruction in the MEXEM app

Trade instructions created through ChatGPT appear under Recent AI Instructions on the MEXEM Home screen.

You decide what happens next

1

Check the details

Review the instrument, Buy or Sell direction, quantity, order type, price and time in force.

2

Review or reject

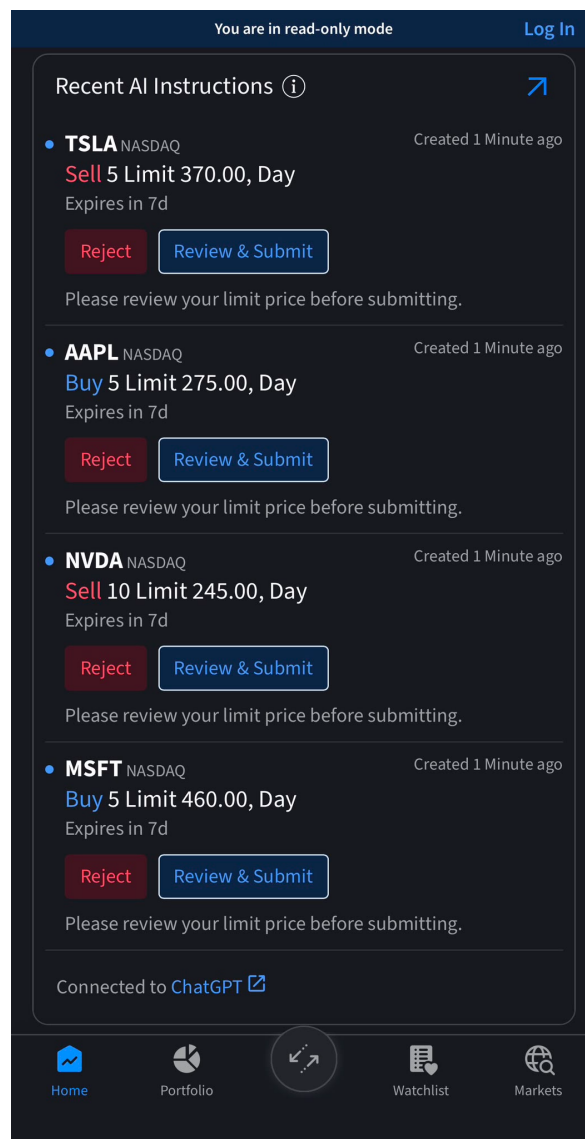
Select **Review & Submit** to continue or **Reject** to discard the instruction.

3

Submit when ready

The instruction becomes an order only after you review and submit it.

HOME PAGE APP



Explore your account and market data

Ask ChatGPT about your connected MEXEM account and the market information available to it.

Real-time or delayed?

REAL-TIME

If your account has the required market-data subscription, available prices may be provided in real time.

DELAYED

If real-time data is not available, delayed data may be provided where supported.

Always check whether the displayed data is real-time or delayed before making a trading decision.

What you can ask ChatGPT

Cash and balances

How much cash do I have?

Portfolio positions

Show my portfolio.

Account overview

What is my account worth?

AI instructions

What is waiting for review?

Open orders

Do I have any open orders?

Portfolio allocation

Show my exposure by sector.

Historical prices

How did NVIDIA perform over six months?

Latest market data

What is Apple trading at now?

Recent trades

What did I trade last week?

Find an instrument

Find Microsoft stock.

Disconnect ChatGPT

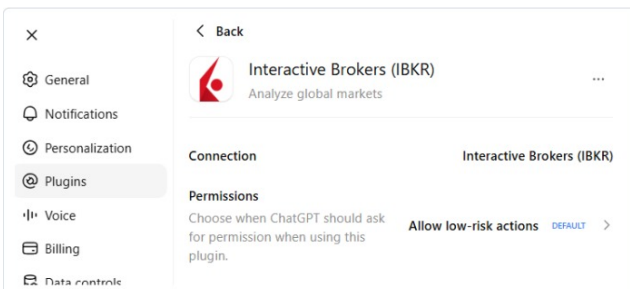
You can stop the connection whenever you want.

Manage your connection

You can review or disconnect the Interactive Brokers connection from ChatGPT settings.

To fully revoke access, use **Manage Third-Party Consents** in Client Portal.

CHATGPT SETTINGS



Revoke access in Client Portal

- 1 **Open Client Portal settings**
Sign in to Client Portal, open your profile menu and select **Settings**.
- 2 **Open third-party consents**
Under Configuration, select **Manage Third-Party Consents**.
- 3 **Revoke access**
Find the ChatGPT connection and select **Revoke Access**.

Important

Disconnecting the integration in ChatGPT stops ChatGPT from using the connection.

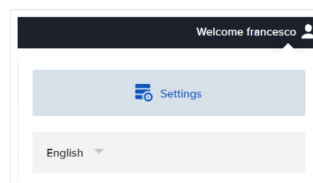
Revoking access in Client Portal removes the account authorization.

After you revoke access

ChatGPT will no longer be able to access the authorized account through this connection or create new trade instructions for it.

You can reconnect later by repeating the connection process.

1 CLIENT PORTAL



2 CONSENTS

Configuration
[Manage Third-Party Consents](#)

3 REVOKE

