



Connect Claude to your Mexem Account

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

About this service

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

This guide explains how to connect your MEXEM account to Claude. 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 Claude connection lets you link your MEXEM account to Claude 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. Claude is a separate service operated by Anthropic. 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 Claude draft.

Before you connect

Connecting shares your account data with a third party.

You are sharing your account data with Anthropic

Connecting Claude authorises Anthropic 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. Anthropic 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 Claude and add the Interactive Brokers integration.

Before you begin

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

1 Open Settings

From the **File** menu, select **Settings**.

2 Open Connectors

Under Customize, select **Connectors**.

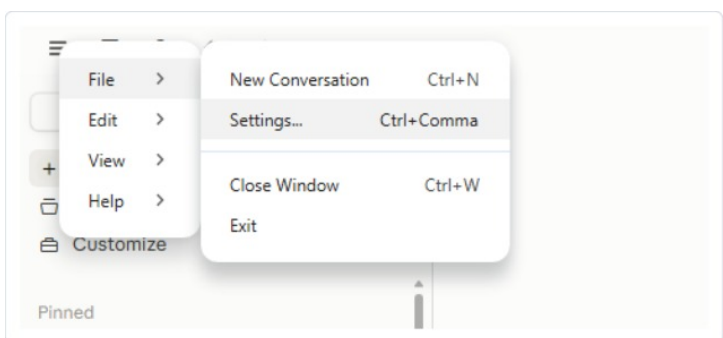
3 Find Interactive Brokers

Find **Interactive Brokers (IBKR)** in the list.

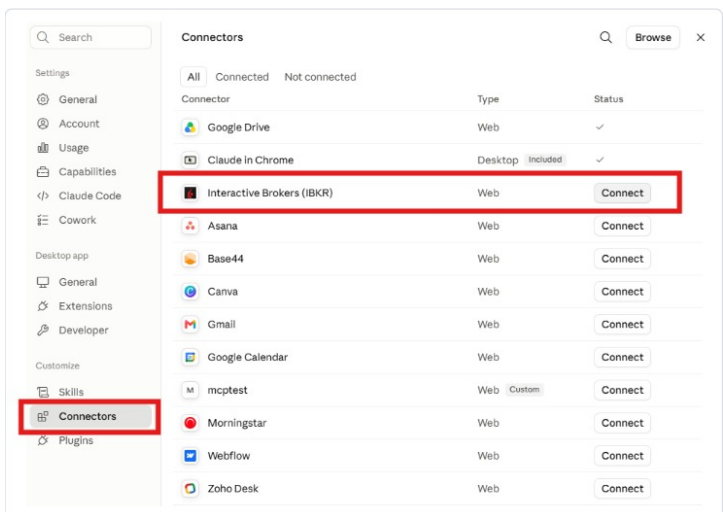
4 Start the connection

Select **Connect**.

SETTINGS

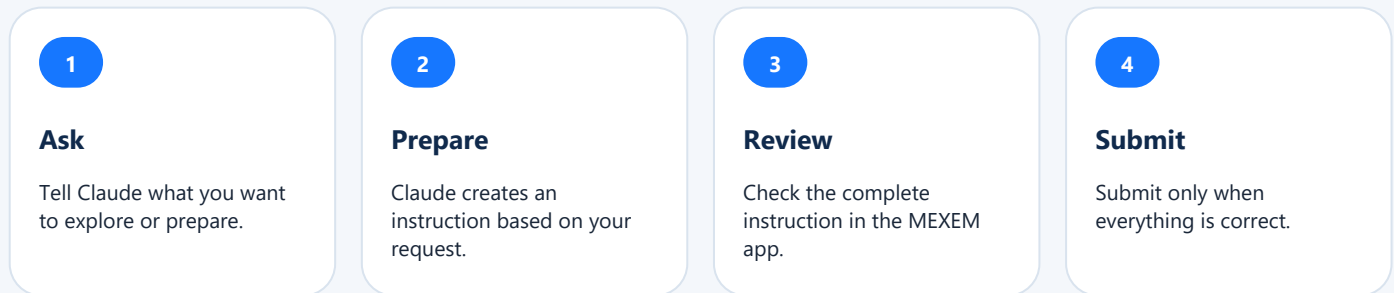


CONNECTORS



From conversation to order

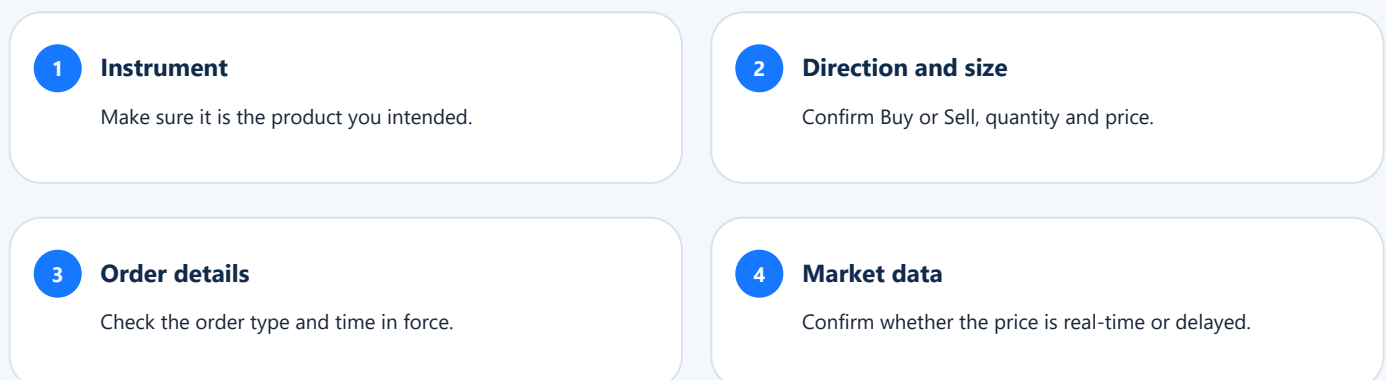
Claude can prepare an instruction. You decide whether it becomes an order.



Claude is a third-party AI service

Claude is operated by Anthropic, 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

Claude 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 Claude 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

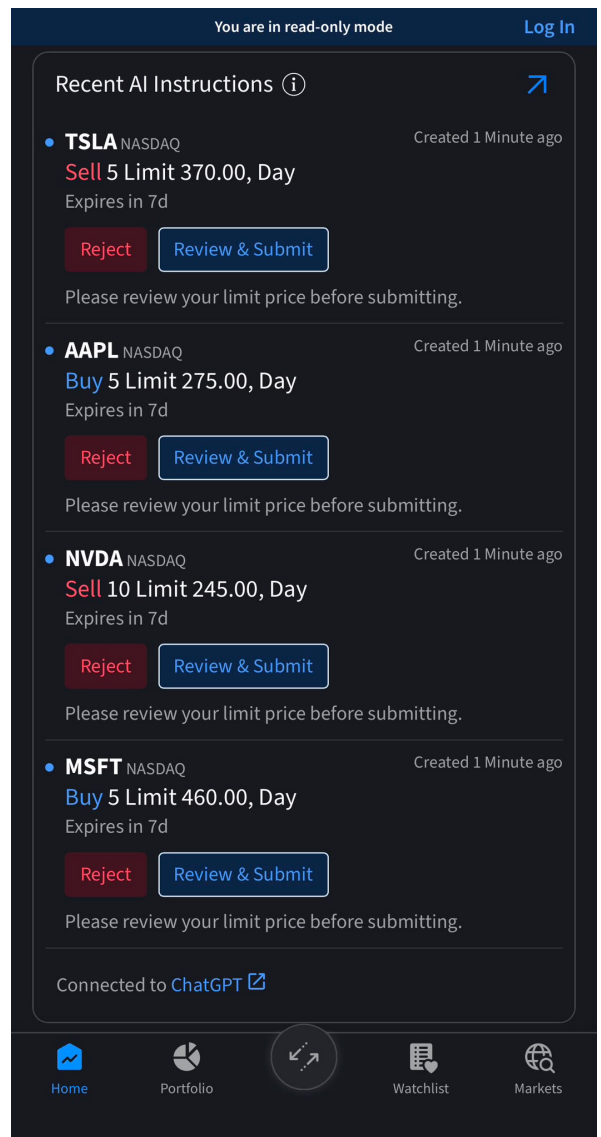
Select **Review & Submit** to continue or **Reject** to discard the instruction.

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 Claude 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 Claude

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 Claude

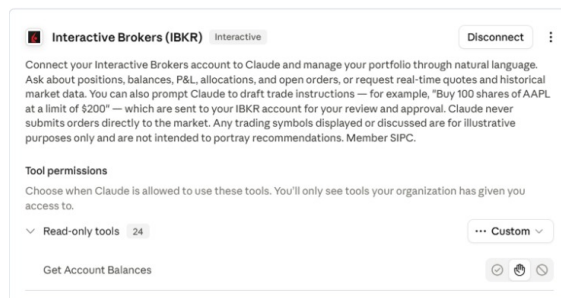
You can stop the connection whenever you want.

Manage your connection

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

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

CLAUDE 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 Claude connection and select **Revoke Access**.

Important

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

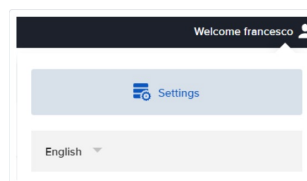
Revoking access in Client Portal removes the account authorization.

After you revoke access

Claude 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

