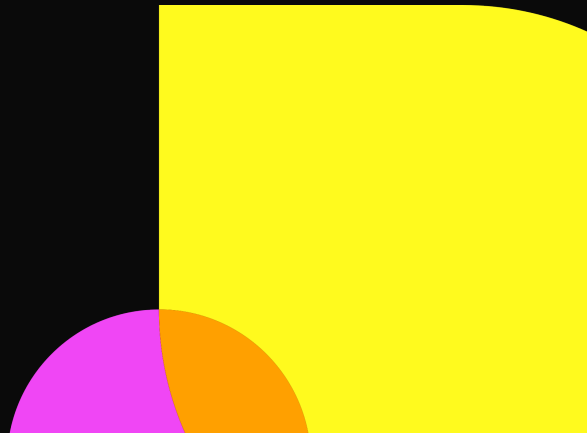




USER GUIDE

The GenTwo connector for Claude

Getting started · 2026



INTRODUCTION

The GenTwo connector setup

The GenTwo connector lets you work with your GenTwo Pro data directly in Claude. Products, valuations, performance, orders and pending workflow tasks, asked in plain language. Claude fetches the answers live from the platform, scoped to exactly what you are entitled to see. The steps below give you a quick overview of the process.

 **The connector is read-only.** It cannot create, change or approve anything, and it cannot move money or assets.

1

Check what you need

A GenTwo Pro account, and a Claude plan that supports connectors.

2

Add the connector

Add GenTwo from the connectors directory, or manually as a custom connector. Go to **Claude/Settings/Connectors** and select GenTwo.

3

Sign in with your GenTwo login

Claude redirects you to the GenTwo sign-in page. Authentication uses OAuth 2.0 to ensure that your password is never shared.

4

Ask away

The first time Claude uses a tool, it asks permission to access your GenTwo data. You can **Deny**, **Allow once** or **Always allow**. Since the connector is read-only, you can safely allow it.

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01

What you need

Accounts, plans and supported Claude clients

- 1 A GenTwo Pro account**
An existing GenTwo Pro user account.
- 2 A Claude plan that supports connectors**
See Anthropic's documentation for plan availability.

Supported Claude clients

**claude.ai**

Web

**Claude Desktop**

Mac and Windows

**Claude mobile**

iOS and Android

**Claude Code**

Command line

02

Adding the connector

From the directory, or as a custom connector

- 1 In Claude, open **Settings** and go to **Connectors**.
- 2 Search the connectors directory for **GenTwo** and select **Connect**. This is the recommended route.
- 3 If you prefer adding it manually, choose **Add custom connector** and enter the connector URL.

CONNECTOR URL

`https://mcp.gentwo.com/mcp`

Leave the Client ID and Client Secret fields empty, the connector registers itself automatically.

3

Add custom connector

×

Connect Claude to your data and tools. [Learn more about connectors](#) or get started with [pre-built ones](#).

GenTwo

Shown in the connectors list.

https://mcp.gentwo.com/mcp

The HTTPS address where the server accepts MCP requests, for example `https://mcp.example.com/mcp`.

▼ Advanced settings

Only use connectors from developers you trust. Anthropic does not control which tools developers make available and cannot verify that they will work as intended or that they won't change.

Building an MCP server? [Report issues and subscribe to updates here](#)

Cancel

Add

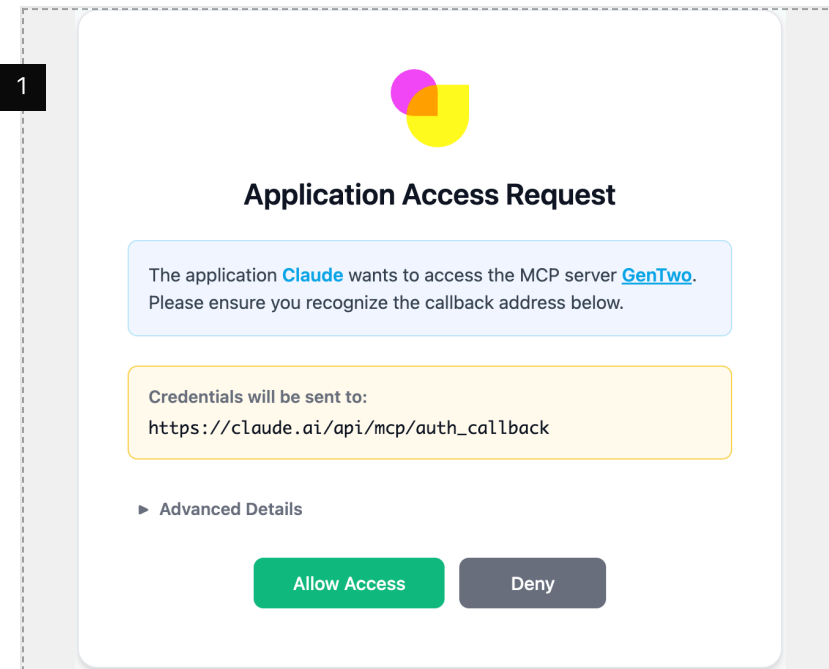
03

Signing in with your GenTwo login

OAuth 2.0, revocable at any time

- 1 When you connect, an **Application Access Request** page opens, confirming that Claude wants to access the GenTwo MCP server and showing the callback address your credentials are sent to. Check the address, then select **Allow Access**.
- 2 Claude then redirects you to the GenTwo sign-in page. Sign in as you would, including two-factor authentication.
- 3 The first time Claude uses a tool, it asks permission to access your GenTwo data. You can **Deny**, **Allow once** or **Always allow**. Since the connector is read-only, you can safely allow it.

✓ Your password is never shared with Claude or Anthropic. Authentication uses **OAuth 2.0**, and Claude only receives a token that you can revoke at any time by disconnecting the connector.



04

Asking your first questions

Example prompts to start with

"Summarize my portfolio."

"Show its valuation history for the last 12 months."

"List my USD products."

"Are there any orders on my products?"

"Show me the details for ISIN CH0123456789. What are the fees?"

"What's waiting on me right now?"

"How has that product performed this year?"

"What are the fees booked on that product this year?"

💡 You can combine the data with everything else Claude can do: compare products, draft a client summary from a valuation history, or turn your pending tasks into a prioritized to-do list.

05

Available tools (1 of 2)

The thirteen read-only tools and what they return

TOOL	WHAT IT RETURNS
get_current_user	Your GenTwo user profile: name, email, roles, company
list_products	Your products with status, issuer, currency and latest valuation, supports search, filters and sorting
get_portfolio_summary	Counts across all your products by status and currency, plus top Issuers
get_product_details	One product by ISIN: terms, dates, fees, parties and latest valuation
get_valuation_history	A product's NAV/price time series, optionally for a date window
get_product_performance	Computed period return, high/low and a sampled price series for one product
get_fee_summary	Contractual fee rates, currently accrued amounts and the last recorded fee payments

05

Available tools (2 of 2)

The thirteen read-only tools and what they return

TOOL	WHAT IT RETURNS
get_fee_history	The accrued-fee history per fee type, from the platform's fee report
get_termsheet	The text of the latest termsheet
get_termsheet_annex	One annex of the latest termsheet. Annex 1 typically describes the underlying
list_orders	Subscription orders on your products, with states and filters
list_tasks	Your workflow tasks, pending by default
get_task_details	One workflow task by ID, with its full step-by-step history

 Some tools mirror features that require specific roles. For example, orders, tasks or fees are only available if your account has the corresponding access. Without the role, Claude receives a clear “access denied” message, nothing more.

06

Data protection and security

What the connector can and cannot do with your data



Read-only by design

No tool can create, modify, approve or delete anything, and none can transfer money or assets.



Your permissions, unchanged

Every request runs under your own GenTwo account. The connector has no privileged access of its own.



No data stored

GenTwo stores only the encrypted sign-in tokens needed to keep your connection alive, plus technical activity logs. Your product data is fetched live and is not retained.



Your conversation lives with Anthropic

Answers become part of your Claude conversation and are handled under your own agreement with Anthropic. GenTwo transmits nothing beyond what you ask for.



Disconnect anytime. Remove the connector under **Settings/Connectors** in Claude. This revokes its access immediately. See also the [GenTwo Privacy Policy](#).

07

Limits and responsible use

What the connector is not



Claude can be wrong

Answers are generated from the data returned, and can misread or omit something. Verify anything material in GenTwo Pro before acting on it.



Not a record of account

GenTwo Pro and the signed termsheet remain the authoritative sources. Do not use Claude's output for accounting, regulatory or client reporting.



Not advice

The connector provides data, not investment, tax or legal advice, and it cannot place, amend or approve an order.



Point-in-time, single-currency

Valuations carry an age and can be stale. There are no FX rates, so figures in different currencies are never combined into a single total.

08

Troubleshooting

Common symptoms and what to do

SYMPTOM

WHAT IT MEANS / WHAT TO DO

"Access denied" on orders or tasks

Your account doesn't have the corresponding role for that feature. This is expected, everything else keeps working.

Fees aren't found, but the product exists

Fee data is available to the product's Product Manager. Other roles see the product but not its fees.

Claude asks you to reconnect, or authentication expired

Your session ended. Reconnect via **Settings/Connectors** and sign in again.

A product isn't found

Check the ISIN, and that the product is one of yours. The connector only sees products under your account.

Orders or tasks come back empty

There may simply be none in the selected period. Try a longer time range, e.g. "all orders this year".

The connector won't connect

Confirm your Claude plan supports connectors, then remove and re-add the connector. If it persists, contact us.



09

Support

Questions, feedback or a security concern? Contact dev@gentwo.com.

See also the [GenTwo Privacy Policy](#).

