

MCP SERVER

NO CODE

CLOUD HOSTED

Carta MCP for AI Agents

Analyze corporate ownership and track 409A valuations

Carta MCP gives your AI agent direct access to critical financial data for startups. You can query full capitalization tables, review active stock option grants, check ownership percentages, and monitor 409A valuations without ever opening the core equity management dashboard.

F Quality Score 3.6/100

equity-management

cap-table

valuation

stock-options

stakeholder-management

financial-compliance



The connectivity layer between AI and the world's software.



Vinkius sits between AI and every application. All communication passes through Vinkius Cloud via the Model Context Protocol (MCP) — with governance, observability, and security at every layer.

Your AI Connections Run Through Vinkius Cloud

The world's largest
managed MCP catalog

Vinkius is the connectivity layer where AI connects to the software your business already runs. We handle the hosting, the security, the credentials, the uptime — you get agents that actually do things.

We operate the world's largest managed MCP catalog. Major SaaS platforms, CRMs, databases, and cloud providers — running, monitored, production-ready. This MCP server is hosted and maintained by the Vinkius Cloud for AI Agents.

The agent doesn't manage credentials, doesn't manage uptime, doesn't manage security. Vinkius does.

— Architecture principle

Four Pillars of the Vinkius Runtime

01 — Security by design

Credentials stay encrypted at rest via AES-256. The AI agent never touches raw keys — they're injected into a sandboxed V8 isolate at runtime. Actions are logged, and connections have an emergency kill switch.

03 — Deterministic observability

Eight immutable metrics per endpoint: request volume, p95 latency, error rate, active connections, cost attribution. A live payload feed logs every tool call with mutation detection.

02 — Built on MCP Fusion

This MCP server was built with **MCP Fusion**, the open-source framework (Apache 2.0) that powers the entire Vinkius catalog. Schema-as-firewall strips undeclared fields, compiled PII redaction runs at zero overhead, and cryptographic lockfiles produce git-diffable audit trails.

04 — Autonomous operations

Servers are deployed, monitored, and patched autonomously. New capabilities and security patches ship weekly. Zero-downtime deployments ensure continuous availability across all managed MCP servers.

AES-256

Encryption at rest

Ed25519

PKI vault signatures

24h TTL

Ephemeral session keys

V8 Isolate

Sandboxed execution

One Token. Instant Access.

Every MCP server on Vinkius is accessed through a **Connection Token**. Tokens are generated in the cloud dashboard and produce a unique MCP endpoint URL. Paste this URL into any MCP-compatible client — no SDK required.

A single token can serve **multiple AI clients simultaneously**, or you can issue separate tokens per client for granular access control. Each token tracks its own request count, last activity timestamp, and can be individually enabled or revoked.

MCP ENDPOINT

`https://edge.vinkius.com/{token}/mcp`

Claude



Cursor



VS Code



Windsurf



Grok



Gemini

Security Is the Architecture

Security in Vinkius is not a feature — it's the foundation of the runtime. The gateway enforces multiple independent protection layers between AI agents and third-party APIs.

01 — Ed25519 PKI Vault

Every workspace has an Ed25519 Master Key. Session keys are generated ephemerally (24h TTL) and signed by the Master Key. Credentials never leave the vault boundary.

02 — V8 Isolate Sandboxing

Tool code runs inside isolated-vm V8 isolates with 64 MB memory caps and per-request timeouts. No filesystem access, no network access except through the SSRF-guarded fetch bridge.

03 — SSRF Guard

All outbound HTTP requests are DNS-resolved and validated before execution. Private IP ranges (10.x, 172.16-31.x, 192.168.x, AWS metadata 169.254.x) are blocked at the network layer.

05 — Cryptographic Audit Trail

Every request is signed into a SHA-256 hash chain with Ed25519 signatures. Events form a tamper-proof, SIEM-exportable forensic record.

04 — DLP & PII Redaction

A ResponseGuard pipeline intercepts every tool response. Configurable redaction patterns strip sensitive fields (emails, SSNs, card numbers) before data reaches the AI agent.

06 — Honeypot Trap System

Phantom credentials are injected into isolated environments. If a honeypot is used outside Vinkius infrastructure, the server is quarantined instantly.

Emergency Kill Switch

EU AI Act Art. 14(1)
Compliant

The kill switch is an **emergency halt** mechanism — not a simple toggle. When triggered, it executes three actions atomically:

01 — Server deactivated

The MCP server is immediately taken offline across the entire cluster.

02 — All tokens revoked

Every connection token is invalidated. Total lockout — reconnection blocked until new tokens are issued.

03 — WebSocket connections killed

Active connections terminated via Redis pubsub broadcast. Propagates to every runtime node in the cluster.

Full Visibility. Zero Guesswork.

The Vinkius cloud dashboard includes a full MCP Governance suite — real-time analytics and security controls for production AI operations.

Control Plane

KPI dashboard with request volume, latency, success rate, token consumption, and AI-generated operational briefings.

FinOps

Cost tracking per tool, payload compression savings, budget optimization signals, and consumption trends.

Firewall & DLP

PII redaction activity, sensitive data protection counters, and security event timeline.

Agent Activity

Which AI clients are connecting, how often, and what they're doing — real-time session tracking.

Tool Health

Slowest and most error-prone tools, with actionable root-cause insights and performance baselines.

Incident Log

Error trends, failure rates, status-code breakdowns, and forensic audit trail access.

Get started at cloud.vinkius.com — connect your AI agent in under 60 seconds.

Carta MCP

10 tools available
Cloud-hosted on Vinkius

Manage a company's entire equity structure conversationally with this MCP. Instead of logging into multiple dashboards to piece together ownership data, you ask your agent for what you need—whether it's shareholder details or historical valuation metrics. This connector lets users query complex cap tables, listing everything from outstanding shares to share classes and liquidation preferences. You can check all active stock option grants, reviewing vesting schedules and exercise windows instantly. Furthermore, it pulls the latest 409A valuations for compliance reporting and helps you track convertible notes and SAFEs. Since this MCP lives on Vinkius, your AI agent connects through one place to access this powerful financial data stream, letting you get instant answers about dilution or ownership pools during a board meeting.

Core Capabilities

01 — Querying Company Ownership Structures

Retrieve the full capitalization table, including shares outstanding, share classes, and current ownership percentages.

03 — Retrieving Corporate Valuations

Access the latest 409A valuation data and fair market values required for compliance reporting.

05 — Tracking Financing Instruments

List convertible notes and SAFEs or review past funding rounds and company-specific details.

02 — Checking Stock Option Status

List all active stock option plans, reviewing vesting schedules, exercise windows, and grant statuses for employees.

04 — Mapping Stakeholder Records

Query the shareholder registry to find individual equity positions, contact details, and list all affiliated companies.

One Click on Vinkius — From Prompt to Execution

Available at vinkius.com/mcp/carta — connect your AI agent in three steps.

- 01** Subscribe to the Carta integration on Vinkius. Then, create an OAuth app in the Carta Developer Portal, copying your Client ID and Client Secret.
- 02** Connect this MCP to your preferred AI client (Claude, Cursor, etc.).
- 03** Ask your agent a specific question, like 'What's João Paulo's vesting status?' or 'Show me our latest 409A valuation.' The agent uses the available tools to pull and summarize the data.

The bottom line is that you talk to your AI client, and it handles the complex calls to Carta to get a clear answer about your company's equity structure.

Built For

This MCP serves Founders, CEOs, CFOs, and People Ops teams who deal with corporate finance and ownership details. It solves the problem of needing instant answers about dilution or grants without opening multiple complex dashboards.

CFO/Legal Counsel

Pulls 409A valuations and compliance data instantly to prepare for audits, due diligence, or fundraising.

People Ops / HR Manager

Checks employee vesting schedules and grant details without needing to navigate the full Carta dashboard.

Founder/CEO

Gets instant answers about ownership percentages, dilution, and option pool availability during board meetings or investor calls.

What Changes When You Connect

- 01** Get immediate answers about dilution or option pool status using the `get_cap_table` tool, eliminating time spent clicking through multiple tabs.

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- 02 Review employee grant details and vesting schedules instantly. You don't have to navigate the People Ops dashboard; just ask your agent for the data.

 - 03 Stay compliant with financial reporting by accessing the latest 409A valuation via `list_valuations`, ensuring you always use fair market values in your documents.

 - 04 Avoid manual spreadsheet building. The agent pulls details from `get_company` and `list_stakeholders` to build a summary report on demand.

 - 05 Keep track of all financial instruments, including convertible notes and SAFEs, by calling `list_convertibles`, keeping your legal team informed.
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Real-World Applications

Board Meeting Ownership Review

A founder needs to show the board how much equity is left in the option pool. Instead of opening Carta, they ask their agent, and it uses `get_cap_table` to provide a real-time summary showing remaining unallocated shares.

Fundraising Due Diligence

A CFO is preparing diligence materials. Instead of pulling reports manually, they ask their agent to pull all previous funding rounds using `list_funding_rounds` and combine it with current shareholder data for a comprehensive packet.

HR Vesting Status Check

The People Ops manager needs to confirm an employee's current vested share count for payroll. They prompt the agent, which accesses option plans and grants data, giving them a precise percentage and date range without logging into the HR system.

Compliance Audit Prep

A legal team member needs the valuation used for last year's filings. They ask their agent to retrieve all relevant 409A valuations via `list_valuations` and quickly verify if the correct date range is covered.

Patterns to Avoid

Assuming Data Is Available

X AVOID

Asking the agent generally, 'What's our ownership?' without specifying which company or time frame. This leads to vague, useless summaries.

✓ INSTEAD

Always specify the context. Requesting specific data like 'Give me the full cap table for 2023' using ``get_cap_table`` forces the agent to retrieve precise metrics.

Mixing up Securities Types

X AVOID

Confusing common stock with preferred shares, leading to incorrect capitalization summaries.

✓ INSTEAD

Use the tools designed for detail. Querying ``list_securities`` provides a clear breakdown of all share types and their specific rights.

Ignoring Option Plan Status

X AVOID

Thinking an employee's grant is active when it has already passed its exercise window, resulting in bad reporting.

✓ INSTEAD

Use ``list_option_plans`` to verify the current status and expiration dates of any stock option grants before making financial commitments.

The Right Fit

You should use this MCP if you need to analyze or report on complex corporate equity structures, specifically needing access to cap tables, vesting schedules, 409A data, or shareholder details. Think 'compliance' and 'ownership structure.' Don't use it if your primary goal is simple messaging (like sending an email) or basic document generation. For those tasks, a standard communication MCP would work better. If you only need to track general company metadata without deep financial ties, listing companies might suffice, but for anything involving money moves, this MCP is necessary.

Carta MCP: Managing Startup Equity and Cap Tables

Right now, getting a clear picture of who owns what in your company is painful. You have to open the main dashboard, filter by share class, cross-reference different stakeholder groups, and then copy/paste that data into a presentation or memo. It's slow, prone to human error, and you're always worried about using outdated numbers.

With this MCP connected, your agent handles all the complexity. You simply ask for 'the current cap table summary,' and it uses multiple tools like `get_cap_table` to pull every necessary metric—shares outstanding, ownership percentages, and share classes—and delivers a clean answer instantly.

Carta MCP: Tracking 409A Valuations and Compliance Data

The manual process for compliance requires hunting down the most recent 409A valuation reports, checking expiration dates, and confirming that the fair market value is still valid across all departments. This involves deep file system navigation.

This MCP streamlines that entirely. You ask your agent to pull the latest 409A data using `list_valuations`, getting the date completed and the exact per-share valuation without ever leaving your chat interface.

carta: 10 Tools for Equity Management and Valuation

Use these tools to query the company's capitalization table, list stakeholders, retrieve valuations, and track all equity-related data points.

#	TOOL	DESCRIPTION
01	<code>list_companies</code>	Retrieves a list of all companies associated with the account.
02	<code>list_valuations</code>	Pulls and displays historical 409A valuation data for compliance tracking.
03	<code>get_company</code>	Retrieves specific, detailed information about a single company entity.
04	<code>list_stakeholders</code>	Lists every individual or entity recognized as a shareholder in the system.
05	<code>list_securities</code>	Retrieves detailed information about all types of securities held by stakeholders.
06	<code>list_share_classes</code>	Lists and details the different share classes, including their liquidation preferences.
07	<code>list_option_plans</code>	Provides a list of all established stock option plans for employees.
08	<code>list_funding_rounds</code>	Gathers data on past funding rounds and their associated details.
09	<code>list_convertibles</code>	Lists all outstanding convertible notes and SAFEs (Simple Agreement for Future Equity).
10	<code>get_cap_table</code>	Generates a complete, detailed view of the company's current capitalization table.

See It in Action

Real prompts you can use once this MCP is connected to your AI agent through Vinkius Cloud.

- U What are our total outstanding shares, who holds the biggest stake, and what is the remaining option pool?



Current Cap Table Summary

- **Authorized Shares:** 10,000,000
- **Issued & Outstanding:** 7,200,000 shares
- **Option Pool (Unallocated):** 800,000 shares (20%)

STAKEHOLDER GROUP	OWNERSHIP %	SHARES HELD
Founders	45%	3,600,000
Series A Investors	25%	2,000,000
Employee Grants	10%	800,000

- U Give me the latest 409A details. When was it done and what's the price?



Your company's most recent valuation was completed on **March 15, 2025**. The fair market value (FMV) is set at **\$2.85 per share** for Common Stock. This valuation remains valid until September 15, 2025.

- U How many shares did our key employee vest last month? Check the grants.



Vesting Status for João Paulo

- **Grant Date:** June 1, 2023 (50,000 options)
- **Schedule:** 4 years / 1-year cliff
- **Vested to Date:** 21,875 shares (43.75% vested)
- **Next Vesting Event:** 1,041 shares on the 1st of next month.

Frequently Asked Questions

01 How does Carta MCP help me check my company's current ownership structure?

It gives you instant access to the full cap table, showing exactly who owns what and how many shares are outstanding. You can get this summary without navigating complex dashboards or running multiple reports.

02 Can I use Carta MCP to check employee vesting schedules?

Yes. It pulls grant details directly, telling you the total options granted, the current vested amount, and when the next shares are scheduled to vest. This is perfect for HR teams.

03 What kind of valuation data can Carta MCP provide?

It provides access to your 409A valuations, telling you the official fair market value per share and the date range that valuation remains valid. This is critical for compliance.

04 Is Carta MCP better than manually pulling data from my dashboard?

Absolutely. It's conversational. Instead of clicking through multiple screens to piece together a report, you just ask your agent, and it pulls the relevant data across all necessary tables for one answer.

05 How does Carta MCP help me with fundraising due diligence?







It aggregates key financial metrics needed for investors. You can quickly pull details on funding rounds, outstanding securities, and the current cap table in one go to prepare a complete data packet.

Go Live in 60 Seconds

Get your connection token from cloud.vinkius.com, then paste the endpoint URL into any MCP-compatible client.

YOUR MCP ENDPOINT

```
https://edge.vinkius.com/[TOKEN]/mcp
```

CLIENT	WHERE TO CONFIGURE
 Claude AI	Profile → Customize → Connectors → "+" → Add custom connector → Paste endpoint
 Cursor	Settings → Features → MCP Servers → "+ Add New MCP Server" → Type: SSE → Paste endpoint
 VS Code	Ctrl/Cmd+Shift+P → "MCP: Add Server" → add <code>"carta": { "url": "..." }</code>
 Windsurf	MCP Settings → <code>mcp_settings.json</code> → Add endpoint URL
 ChatGPT	Settings → Tools & plugins → Add MCP server → Paste endpoint
 Gemini	Extensions → Add MCP Server → Paste endpoint URL

ASK AN AI ABOUT THIS

Let your preferred AI explain this MCP server

-  **Ask ChatGPT** 
-  **Ask Claude** 
-  **Ask Perplexity** 
-  **Ask Gemini** 
-  **Ask Grok** 

READY TO CONNECT

Carta is live on Vinkius Cloud.

Get your connection token, paste it into your AI agent, and start building. No SDK. No deployment. Just results.

[Start at cloud.vinkius.com](https://cloud.vinkius.com) →

vinkius.com · support@vinkius.com

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