

M C P S E R V E R

N O C O D E

C L O U D H O S T E D

Estate Document Review Calendar MCP

Keep your legal documents current and organized.

Estate Document Review Calendar MCP tracks the lifecycle of your Wills, Trusts, and other critical legal documents. It monitors review intervals and life changes to ensure your estate plan stays valid. Your AI client uses this to manage review schedules, prepare for professional meetings, and maintain a clear history of all document updates.

A+ Quality Score 100/100

estate

documents

scheduling

legal-planning

organization



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.

Estate Document Review Calendar MCP

4 tools available

Cloud-hosted on Vinkius

Managing an estate plan isn't a one-time task. Documents like Wills and Trusts need regular check-ins to stay relevant as your life changes. This MCP gives your AI client the ability to act as a dedicated estate coordinator. Instead of digging through files, you can ask your agent to find out when your next review is due or where a specific document is physically stored.

You can use it to prepare for meetings with lawyers by generating checklists that cover beneficiary verification and executor details. It also keeps a running log of every update you make, so you never lose track of the document's history. Whether you are tracking periodic reviews or reacting to a major life event, this MCP keeps your legal planning organized and actionable through your preferred AI client.

Core Capabilities

01 — Review Scheduling

Your agent identifies upcoming document review dates based on time intervals.

02 — Meeting Preparation

Your AI client generates checklists to prepare you for legal consultations.

03 — Document Location Mapping

Your agent finds where documents are kept and who has permission to see them.

04 — Update Logging

Your AI client records a history of all changes made to your estate files.

One Click on Vinkius — From Prompt to Execution

Available at vinkius.com/en/ai-agent-connect/estate-document-review-calendar — connect your AI agent in three steps.

- 01

Connect your AI client to the MCP via Vinkius.
- 02

Ask your agent to check for upcoming document review dates.
- 03

Use the agent to locate documents or prepare meeting checklists.
- 04

Record any changes or updates to your documents through the agent.

Connect the MCP to your AI client to start managing your estate documents through natural language.

Built For

This MCP is built for individuals and professionals managing complex estate plans and legal documentation.

Estate Planners

Use the MCP to track client document lifecycles and review schedules.

Legal Assistants

Hand off document location mapping and meeting prep to your AI agent.

Individuals

Manage personal Wills and Trusts by tracking necessary updates and storage locations.

What Changes When You Connect

- 01

Automates the tracking of document review intervals.
- 02

Centralizes document locations and authorized contact info.
- 03

Maintains a chronological log of all document changes.

04 Reduces meeting prep time with automated checklists.

Real-World Applications

Periodic Review Management

Set a 3-year interval for your Will and have your agent alert you when it is time to update.

Life Event Response

Trigger a document review when a major life change occurs to ensure your plan remains valid.

Meeting Readiness

Generate a checklist before meeting with an attorney to ensure all beneficiaries and executors are verified.

Access Auditing

Quickly identify which authorized contacts can access specific legal documents in your digital vault.

Patterns to Avoid

Manual review tracking

❌ AVOID

You try to remember every three years when you last updated your Will by keeping a mental note or a sticky note.

✓ INSTEAD

Let your agent handle the timing. Use ``get_review_calendar`` to see exactly when your documents need attention based on your set intervals.

Vague document searches

❌ AVOID

You spend twenty minutes searching through various folders and cabinets trying to find where a specific Trust is kept.

✓ INSTEAD

Stop hunting for files. Use ``get_document_access_map`` to immediately identify the physical or digital location and who has permission to see it.

Unprepared legal meetings

❌ AVOID

You show up to an appointment with your attorney and realize you forgot to verify the current executor details.

✓ INSTEAD

Use `generate\_appointment\_checklist` before the meeting to ensure you have every necessary detail ready for your lawyer.

The Right Fit

Connect this MCP if you manage complex estate plans or multiple legal documents that require periodic updates. Do not connect it if you only have a single, static document that never needs review. The decision depends on whether your legal documents require a structured lifecycle and an audit trail.

Estate Document Review Calendar 4 Tools

These tools manage your document lifecycles, track physical and digital storage locations, and prepare you for legal consultations.

#	TOOL	DESCRIPTION
01	generate_appointment_checklist	This tool creates a specific checklist for your upcoming professional document review meetings. It helps you prepare by listing what needs to be verified.
02	get_document_access_map	This tool maps out where your documents are stored and identifies who is authorized to access them. It links files to physical or digital locations.
03	get_review_calendar	This tool provides a list of upcoming review dates based on set time intervals or recent life changes. It tells you exactly when a document needs attention.
04	record_document_update	This tool maintains a historical log of every change made to a document. It ensures you have a clear audit trail of all updates.

See It in Action

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

U When should I next review my estate documents?



Your next review for the 'Last Will and Testament' is scheduled for October 15, 2025, due to your 3-year periodic review interval.

U Help me prepare for my meeting to review my Will and Trust.



Here is your checklist: 1. Verify current beneficiaries (High Priority), 2. Confirm executor contact details (Medium Priority), 3. Review storage locations for physical copies (Low Priority). Professional verification is required for these documents.

U Where is my Power of Attorney stored and who can access it?



The Power of Attorney is stored in your Secure Digital Vault, and access is authorized for John Doe and Jane Smith.

Frequently Asked Questions

01 How does the MCP track when to review my documents?

The MCP uses set time intervals or specific life changes to trigger review events in your calendar.

02 Can I use this with Claude or Cursor?

Yes, you can connect this MCP to any MCP-compatible client including Claude, Cursor, and Windsurf.

03 What information is stored in the document update log?

The tool records a historical log of all updates made to your documents to maintain a clear audit trail.

04 Does this MCP store my actual legal documents?

No, this MCP manages the metadata, locations, and schedules for your documents, such as where they are stored and who can access them.

05 How do I prepare for a meeting with my lawyer using this tool?

You can ask your AI client to generate an appointment checklist, which will provide a list of items to verify, such as beneficiaries and executor details.

06 How do I know when my documents need updating?

You can use the `get\_review\_calendar` tool to see upcoming review dates triggered by your defined intervals or specific life events.

07 Can I prepare for a meeting with my lawyer using this tool?

Yes, the `generate\_appointment\_checklist` tool creates a structured list of tasks and goals to help you prepare for professional reviews.

08 Where can I find my document locations?

The `get\_document\_access\_map` tool provides a mapping of your documents to their storage locations and the authorized contacts who can access them.

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>"estate-document-review-calendar": { "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

Estate Document Review Calendar 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 →

vinkius.com · support@vinkius.com

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Endpoint	<code>https://edge.vinkius.com/{token}/mcp</code>

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