Claim Substantiation: First in Australia

My SMSF (R S Capital Partners Pty Ltd, ABN 67 145 282 908, trading as My SMSF / My SMSF Property) | Prepared 11 November 2026 | Media contact: Robbie Joseph, media@mysmsfproperty.com.au, 1300 545 516

1. The claim

My SMSF states that it is **the first SMSF administrator in Australia to open its services to AI assistants and AI agents through the Model Context Protocol (MCP) and an agent-to-agent (A2A) agent card**. Specifically:

• a **public connector** that lets any MCP-compatible assistant (Claude, ChatGPT, Grok and others) get published fees, ask general SMSF questions, check setup fit, request a call, and **start an SMSF setup or transfer application on a person's behalf** (agentic commerce); and

• a **signed-in client connector** (Grace Connect, Gold Care clients) giving a trustee read-only access to their own fund information from their own AI assistant, with OAuth sign-in and consent.

The claim relates to trustee- and agent-facing connectivity. It does not claim My SMSF was the first SMSF business to use AI internally.

2. Dated evidence of launch

Date (Sydney time)	Evidence	Where it can be verified
2 Oct 2026, 6:04 pm AEST	First automated notification from the My SMSF Agent Gateway, followed by a series of end-to-end tests. At 7:14 pm a setup application was started by an AI agent (Claude) over MCP: enquiry AG-261002-W2RQJ.	Time-stamped system emails from the My SMSF Agent Gateway (available on request)
2 Oct 2026	Agent card published at mysmsfproperty.com.au/.well-known/agent-card.json, advertising the MCP and A2A endpoints	Live URL; server file date
October 2026	Public 'My SMSF' MCP connector submitted to Anthropic's Claude Connectors Directory	Submission record held by My SMSF
25 Oct 2026	Public page 'My SMSF AI' published with connection steps for Claude, ChatGPT and Grok	mysmsfproperty.com.au/my-smsf-ai/
11 Nov 2026	Live check: MCP handshake succeeded, 6 tools listed (get_services, ask_question, check_setup_fit, request_setup_call, start_setup_application, get_enquiry_status); A2A agent card and Grace Connect sign-in metadata responding	agents.mysmsfproperty.com.au/mcp; llms.txt

3. Market scan: other Australian SMSF AI initiatives

On 11 November 2026 we searched public news and vendor sources for Australian SMSF providers offering MCP connectors, agent cards, or AI-agent access for trustees. The AI initiatives we found are internal or practitioner tools. None publicly offers an MCP connector or AI-agent access to start applications:

Provider / date	What was launched	MCP / external AI-agent access?
SMSF Adviser report, Oct 2024	AI-processed SMSF administration and reporting, sold white-label to firms	Not mentioned
Smarter SMSF, Feb 2026	AI Q&A tool for Smarter SMSF's own subscribing clients	Not mentioned; closed platform
Class (with Rhellm), Jul 2026	Financial reporting video; intelligent transaction matching for accountants	Not mentioned; practitioner-facing
BGL	Business intelligence agent built on Claude Agent SDK and Amazon Bedrock	No external MCP connector mentioned

Sources: smsfadviser.com/ai-meets-smsf-administration-in-world-first; smsmagazine.com.au/news/2026/02/25/smarter-smsf-launches-ai-tool/; smsmagazine.com.au/news/2026/07/15/class-launches-two-ai-solutions/; news.ainauten.com (BGL and Claude Agent SDK).

4. Basis and limitations

This is My SMSF's own claim, supported by the dated records and the public market scan above. A scan of public information cannot rule out unannounced or private deployments. My SMSF will review the claim if earlier evidence comes to light. All services described are general information only, not personal financial advice. AI agents cannot

complete identity verification, sign documents or make payments; the person does these steps themselves.