AdviceOS Release 1 (Apr 2026)

We wish to inform you of recent updates to AdviceOS, and the Dynamic Fact Find as part of our current release. For your convenience, these changes have been organised according to the relevant areas of the software and categorised based on whether they introduce new functionality or address issues raised by users or staff. Please refer to the table of contents below for a summary of the updates:

Summary of Changes

AdviceOS

In preparation for our release scheduled for the evening of 13 Apr 2026, please review the following items outlining changes that will impact various modules within AdviceOS. The specific module/s impacted are listed within each item.

Enhancements

Rate Changes in Preparation for 1st July 2026	
Module: Modelling	**Reference:** 93896
Details: In preparation for the 2026 financial year, a number of rates have been increased from 1st July 2026 for all modelling modules. This includes: • Increase of the transfer balance cap from $2m to $2.1m • Increase of the concessional cap from $30,000 to $32,500 • Increase of the non-concessional cap from $120,000 to $130,000 • Increased the co-contribution lower & upper thresholds to $49,293 and $64,293 respectively	
Configurations required: N/A	
Actions: N/A	

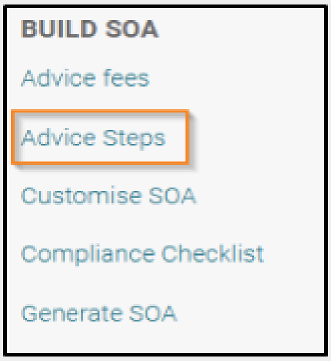
Enhanced Output for Company & Trust Reporting	
Module: Templates	**Reference:** 93993
Details: We've added new Assets and Loans charts and tables, along with Tax charts and tables for Companies and Trusts, to the Midwinter SOA and Cashflow and Capital Report templates.	
Configurations required: N/A	
Actions: N/A	

Planbuilder- Introducing Advice Steps

Module: Planbuilder	**Reference:** 93895

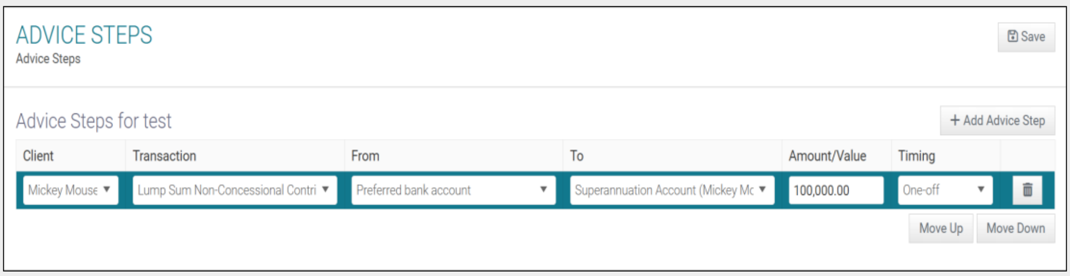
Details: New functionality has been introduced within Planbuilder, allowing a user to select the appropriate Advice Steps needed to implement the advice provided to the client.

This functionality is available within the Advice Build section of Planbuilder.



A user is able to:

- Add the steps,
- select the appropriate client,
- the type of transaction
- the accounts from and to
- any value that may be relevant
- frequency of the transaction



They can then determine the order of each step using the Up and Down buttons.

These advice steps can then be populated within the SOA or ROA to be part of the advice document. The appropriate minicodes will automatically be included within the existing Midwinter templates.

Configurations required: N/A

Actions: N/A

Advice Steps- Midwinter SOA/ROA Templates Updated	
Module: Templates	**Reference:** 93449
Details: The Advice Steps functionality has been introduced for all users in Planbuilder. A new table has been added within the Midwinter SOA and ROA templates to bring through the relevant information from Advice Steps. The table can be found just after the advice fees tables within the templates.	
Configurations required: N/A	
Actions: N/A	

Task Details Report Enhanced	
Module: Reporting	**Reference:** 94300
Details: A new column "WorkflowName" has been added to the Task Details report (Reporting > Overviews > Task details). This column displays the name of the workflow a task is associated with, aligning with information already available within Workflow Tasks and individual task views. For tasks not assigned to a workflow, the field will display N/A (or remain blank).	
Configurations required: N/A	
Actions: N/A	

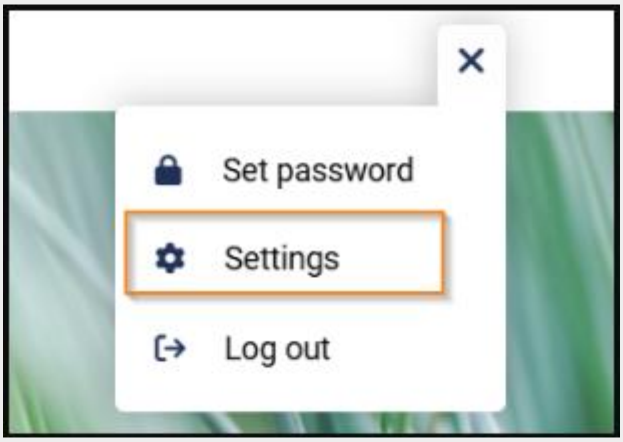
Issues resolved

Contributions Optimiser Logic Updated for YTD Non- Concessional Contribution	
Module: Contribution Optimiser	**Reference:** 93947
Details: Resolved an issue in contribution optimisation where year-to-date non-concessional contributions were not factored into the calculation of available net income. The logic of the optimisation process has been updated to ensure year-to-date contributions are consistently included, improving accuracy and alignment across calculations.	
Configurations required: N/A	
Actions: N/A	

Dynamic Fact Find

As part of the scheduled release on the evening of 15 Apr 2026, please review the following items outlining changes that will impact the Dynamic Fact Find module.

Enhancements

New Page- Settings	
Module: Dynamic Fact Find	**Reference:** 92498
Details: A new page has been created within DFF which is accessed from the icon in the top right corner. This page provides a number of settings for users. It is also set behind a permission, so that only users with the correct permission will be able to access the page. 	
Configurations required: N/A	
Actions: N/A	

Custom Branding	
Module: Dynamic Fact Find	**Reference:** 92493
Details: With the inclusion of a new page in work item 92498, users are provided with new additional functionality to help customise their DFF. This section allows users to be able to: • Upload a logo at the Practice level	

- Upload a logo at the Licensee level
- Change the primary and secondary colour schemes for the DFF pages at the Practice level
- Change the primary and secondary colour schemes for the DFF pages at the Licensee level

This page is set behind permissions and will generally only be provided by users who require changing this functionality, as it will impact all users at the Practice or Licensee

Configurations required: N/A

Actions: If you require this permission, please reach out to our support team.