

AdviceOS Release 1 (Dec 2025)

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 Release 1 (Dec 2025)	1
AdviceOS	2
Enhancements	2
Quarterly Update- ASFA Retirement Numbers Sept 2025	2
Centrelink Updates – Jan 2026	2
Ability to Delete Platforms in Product Comparison	3
Introducing Digital Hub/ Non-Journey Module Filter in Activity	3
Ability to Add or Update Fund Codes in FundsBase	4
Improved Display of Insurance Policy Options in Midwinter SOA and Needs Analysis Quick Print Report	5
Issues resolved	5
Unable to Generate Statistics> User Report	5
Mapping Issue- Acenda Product	5
Fixed- Product Comparison Template Error	6
Dynamic Fact Find	7
Issues resolved	7
Additional Details Field Showing Incomplete Content	7

AdviceOS

In preparation for our release scheduled for the evening of 15 Dec 2025, 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

Quarterly Update- ASFA Retirement Numbers Sept 2025

Module: Modelling

Reference: 79404

Details: The ASFA Retirement Standard living standards have been updated for the Sept 2025 quarter.

Configurations required: N/A

Actions: N/A

Centrelink Updates – Jan 2026

Module: Settings/ Modelling

Reference: 91654

Details: The Centrelink rates and thresholds for January 1st 2026 do not include any changes that impact AdviceOS modelling, so no changes have been made and no updated rates will be deployed to AOS on Jan 1st.

Configurations required: N/A

Actions: N/A

Ability to Delete Platforms in Product Comparison

Module: Product Comparison

Reference: 89820

Details: We have introduced an enhancement to the Product Comparison module that allows users to remove individual platforms directly within a scenario across all comparison types (Super, Pension, Super to Pension, and Investment).

A new delete button has now been added next to each platform within a scenario, enabling users to remove the platforms they no longer wish to include in their modelling.

Select platforms to include in the analysis

☒ Show platforms with zero balance

	Platform	Owner		Existing	Recommended	Alternative 1
Super	Hostplus Choiceplus	Sam	<input checked="" type="checkbox"/>	500,000.00		
Super	Acumen	Sam	<input checked="" type="checkbox"/>	100,000.00		
Super	MyNorth Super	Sam	<input checked="" type="checkbox"/>	400,000.00		
Super	Brighter Super - Suncorp Group Plan	Sam	<input type="checkbox"/>		20,000.00	
Super	CFS FirstChoice Wholesale Personal Super	Sam	<input type="checkbox"/>			400,000.00
Total				1,000,000.00	20,000.00	400,000.00

Deleted platforms will not reappear when 'Show platforms with zero balance' is selected, nor will they be included in Comparison Details or Best Interest calculations. If an existing platform is removed from a Product Comparison scenario, it will also be deleted from the Fact Find.

Configurations required: N/A

Actions: N/A

Introducing Digital Hub/ Non-Journey Module Filter in Activity

Module: Client Records

Reference: 91016

Details: We have introduced a new Digital Hub / Non-Journey Pages option within the Module filter on the Client Record > Activity screen.

This enhancement allows advisers to easily isolate, and review activities generated through the Digital Hub and Client Portal—such as dashboard interactions, objective builder updates, etc.,—by selecting the new module option from the dropdown and supports more efficient activity tracking.

Configurations required: N/A

Actions: N/A

Ability to Add or Update Fund Codes in FundsBase

Module: Fundsbase

Reference: 91364

Details: Users can now add or update Fund Codes for investment options within custom platforms in Fundsbase. The Fundsbase interface has been updated so that when editing an investment option, the assigned Fund Code is visible and can be modified as required.

Edit Investment Option

Name	4 Dimensions Global Infrastructure		
APIR	BFL0019AU	Sector	IntShare ▼
Buy spread (% p.a.)	0.3000	Sell spread (% p.a.)	0.3000
IF (% p.a.)	1.1500	TC (% p.a.)	0.0000
Rebate (%)	0.0000	Fund Code	

Asset Allocation

Australian Shares	0.00	International Shares	100.00
Property	0.00	Australian Fixed Interest	0.00
International Fixed Interest	0.00	Cash	0.00
Alternative Income	0.00	Alternative Growth	0.00

OKCancel

Configurations required: N/A

Actions: N/A

Improved Display of Insurance Policy Options in Midwinter SOA and Needs Analysis Quick Print Report

Module: Templates

Reference: 91704

Details: The layout of the insurance policy options have been updated in the Midwinter Couple and Single SOA templates v9.7 and the Needs Analysis Quick Print template so that the parameter names are clear what the insurance policy option is referring to.

Configurations required: N/A

Actions: N/A

Issues resolved

Unable to Generate Statistics> User Report

Module: Reporting

Reference: 91044

Details: Updated Reporting> Statistics> User report to improve performance and extend timeout meaning reports with larger numbers of users will run successfully in the UI without any application errors.

Configurations required: N/A

Actions: N/A

Mapping Issue- Acenda Product

Module: Fact Find

Reference: 91278

Details: Users will be able to correctly map Acenda insurances in AOS without any error messages.

Configurations required: N/A

Actions: N/A

Fixed- Product Comparison Template Error**Module:** Templates**Reference:** 91075

Details: Percentage figures in comparison reports have been updated to include decimal places, instead of rounding to the nearest whole number.

Configurations required: N/A**Actions:** N/A

Dynamic Fact Find

As part of the scheduled release on the evening of 15 Dec 2025, please review the following items outlining changes that will impact the Dynamic Fact Find module.

Issues resolved

Additional Details Field Showing Incomplete Content	
Module: Other	Reference: 91256
Details: Resolved an issue where the pdf version of the fact find truncated long text fields. These fields will now scale to the size of the content	
Configurations Required: N/A	
Actions: N/A	