AdviceOS Release 2 (Feb 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 16 Feb 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

Angular Update- 19 to 20	
Module: CRM	**Reference:** 91432

Details: The Angular version for AdviceOS has been updated from 19 to 20. The update is to ensure the library is supported, important bug fixes are in place and new features are available.

Configurations required: N/A

Actions: It is recommended that a cache clear is performed to help prevent any issues.

Omnium Insurance Comparator Quick Report – New Minicode	
Module: Templates	**Reference:** 92489

Details: A new minicode has been introduced in the Midwinter Omnium Insurance Comparator Quick Report to automatically display the report generation date. Previously, users needed to manually enter the date in DD/MM/YY format. With this update, the report now dynamically shows the current date in the required DD/MM/YY format whenever the Quick Report is generated, eliminating manual input and improving accuracy and efficiency.

Configurations required: N/A

Actions: N/A

Applying Medicare Levy Exemption for a Client

Module: Fact Find/ Calculators	**Reference:** 89567

Details: Applied an enhancement to both Fact Find and AdviceOS calculators to allow an adviser to determine whether their client is eligible for either a half or full exemption from the Medicare levy.

A new dropdown field has been created in Fact Find > Client Details > Personal Details just below their salary, where an adviser can select either a half or full exemption. It will be at the discretion of the adviser to determine their eligibility.

If either has been selected, all relevant sections of AOS will correctly calculate the Medicare levy at either half the standard amount, or at $0 if full.

Note: Medicare levy exemption does not mean a person is automatically exempt from Medicare levy surcharge, and if a client meets the requirements of this surcharge this will continue to be applied in their projections.

Configurations required: N/A

Actions: N/A

Included "Retirement Bonus" as a New Feature for Pension Accounts

Module: Fundsbase	**Reference:** 85477

Details: Inclusion of a new "Retirement Bonus" feature within Fundsbase specific to pension products. This will capture whether a specific pension product offers any additional payment when a client transfers funds from super to pension internally using the same provider, generally due to tax savings with the transfer.

This will then be available as a feature that can be selected in both Product Comparison & Total Portfolio Analysis.

Retirement Bonus
☐ Paid on internal transfer from super to pension

Configurations Required: N/A

Actions: N/A

Issues resolved

Fact Find – Income & Expenses: Incorrect Frequecncy of the Taxable Amount

Module: Fact Find	**Reference:** 91978

Details: Some users experienced instances where the annual taxable amount was incorrectly displayed with a non-annual frequency, such as monthly. This issue has now been resolved. A database validation rule has also been implemented to ensure that all calculated tax payments are stored with an annual frequency. If a payment with a different frequency is encountered, an error will be displayed, helping identify and prevent future discrepancies

Configurations required: N/A

Actions: N/A

Dynamic Fact Find

As part of the scheduled release on the evening of 18 Feb 2026, please review the following items outlining changes that will impact the Dynamic Fact Find module.

Enhancements

DFF Reporting - Permission	
Module: Other	**Reference:** 92687

Details: Creating a new permission for DFF Reporting to allow and limit certain functionality.

As standard, all advisers will be able to run reports for themselves as the adviser. This has been updated for all users.

For the ability to run reports across all advisers, or at the Licensee/Practice level, there is a permission that is required. This can be provided at request.

Configurations Required: N/A

Actions: N/A

DFF - Changes to the Status Report	
Module: Reporting	**Reference:** 92491

Details: A number of minor adjustments have been made to the State Report within DFF, including:

- Updated titles for certain columns
- Two new columns capturing clients AOS ClientID and External ClientID
- Removed an unnecessary column due to duplication
- Added details of the template version used
- Added details of client and adviser first accessed date

Configurations Required: N/A

Actions: N/A

DFF - Changes to Usage Report

Module: Reporting	**Reference:** 92495

Details: A few minor adjustments to the Usage Report for DFF, including:

- Updating title for first column header
- Adding the AOS ClientID and External ClientID

Configurations Required: N/A

Actions: N/A