AdviceOS Release 1 (Jan 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 19 Jan 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.
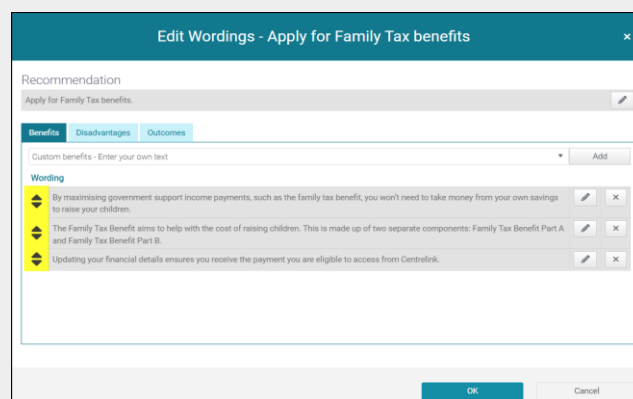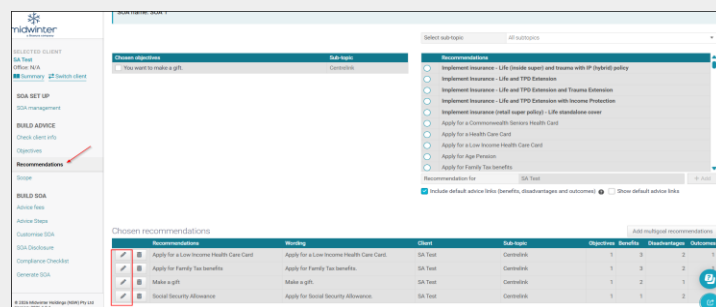
Enhancements

Ability to Re-order the Benefits/Disadvantages/Outcomes Within Planbuilder

Module: Planbuilder | **Reference:** 89819

Details: Planbuilder has been enhanced to allow advisers to easily re-order benefits, disadvantages, and outcomes within the Recommendations section.

Advisers can access this functionality by selecting the pencil icon on the chosen recommendation, then drag and drop individual rows to arrange content according to their preferences. This improvement helps reduce the time spent on formatting plans after the SOA is generated.

Configurations required: N/A

Actions: N/A

Added "Current Age" field to Reports

Module: Reporting | **Reference:** 92051

Details: Included new columns within the following two reports:

- Reporting > Statistics > Client
- Reporting > Group reports > All clients

New columns include:

- Month client was born.
- Year client was born.
- Current age of client.

Configurations required: N/A

Actions: N/A

Improved AdviceOS Folder File Count Display

Module: Documents | **Reference:** 89826

Details: The file count view of the folders have been improved to provide a clearer and accurate file counts for the folders. When a top-level folder contains subfolders, the collapsed view now displays the total number of files across both the top folder and all its subfolders, ensuring files are visible at a glance without needing to expand the structure. When expanded, each folder (top-level and subfolders) shows its own direct file count.

File counts update dynamically as files are added, removed, or moved, reducing confusion and improving visibility when navigating folder hierarchies.

Configurations required: N/A

Actions: N/A

Introducing Drop Down Menu on Settings page

Module: Settings	**Reference:** 79374

Details: The Settings page in AOS has been updated to display a dropdown menu when expected legislated changes are upcoming, allowing users to review the current and future rates. **This dropdown will only appear for a short period of time prior to the new rates taking effect.**

Configurations required: N/A

Actions: N/A

Updated Asset- Based Admin Fee Logic for Mercer Portfolios

Module: Fundsbase	**Reference:** 90800

Details: AdviceOS fee calculation logic has been enhanced to support Mercer's asset-based administration fees for blended investment portfolios, in line with Mercer's Product Disclosure Statement (PDS).

For Mercer Blended Investment Portfolios (Choice + SmartPath), administration fees are now capped based on the combined balance across Choice and SmartPath, with the cap applied only when the total balance exceeds $500,000. The capped amount is allocated proportionally between Choice and SmartPath according to their respective balances, and fees are calculated on a pro-rata basis using the applicable fee percentages and cap values defined in the plan's fee schedule.

There are no changes to the fee calculation methodology for Mercer Single Investment Option portfolios.

Configurations required: N/A

Actions: N/A

Angular Update- Version 19

Module: CRM	**Reference:** 90735

Details: The Angular version for AdviceOS has been updated from 18 to 19. 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.

Dynamic Fact Find

As part of the scheduled release on the evening of 21 Jan 2026, please review the following items outlining changes that will impact the Dynamic Fact Find module.

Enhancements

Introducing Snapshot Functionality	
Module: Other	**Reference:** 91371

Details: Introducing new functionality to further integrate Dynamic Fact Find with AdviceOS. After an adviser reviews and publishes a submitted fact find within DFF, a snapshot will be created within AOS under the relevant client.

By publishing the fact find the related fields in AOS will be automatically updated (current functionality) so the user does not need to navigate to AOS and then merge the snapshot. The purpose of this snapshot will be as a historical record of the changes made at that point in time, which a user can refer back to in the future.

Configurations Required: N/A

Actions: N/A

Added Fields to Enter Partner Contact Details	
Module: Templates	**Reference:** 91875

Details: The Midwinter and AIA Dynamic Fact Find templates have been updated to capture and display a partner's contact details when the client confirms that their partner will also be receiving advice. When enabled, the Partner Contact Details section on the Contact Details page will display the below fields:

- Home phone,
- Work phone,
- Mobile phone,
- Email address.

Configurations Required: N/A

Actions: N/A