

AdviceOS Release R1 (July 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:

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AdviceOS

In preparation for our release scheduled for the evening of 06/07/2026, 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

Update ASFA Retirement numbers - Mar Quarter 2026

Module: Legislation

Reference: 93470

Details: The ASFA Retirement Standard living standards have been updated for the March 2026 quarter.

Configurations required:

Actions: N/A

Update to LISTO methodology

Module: Modelling

Reference: 95849

Details: The calculation methodology for LISTO has been updated to reflect the new legislation.

The threshold for LISTO will be pegged to the current \$45,000 tax bracket, and the maximum amount of LISTO calculated as the contributions tax payable on SG contributions at that salary.

Configurations required:

Actions: N/A

Add Change Tracking for Risk Profile - Details and Default Settings pages

Module: Auditing

Reference: 95860

Details: Internal audit logs are now recorded when creating and modifying Risk Profile settings

Configurations required:

Actions: N/A

Include type & subtype to file note templates

Module: Templates

Reference: 96132

Details: Enhanced the file note template management functionality to allow for two additional fields.

When creating a file note a user will be provided the ability to select the Type and Sub-Type for that template. When this file note template is then created, the options selected will be automatically populated.

By default these will be Type General & Sub-Type Filenote.

Configurations required:

Actions: N/A

Remove indexation of low rate cap

Module: Legislation

Reference: 96481

Details: Have removed the indexation of the low rate cap, which previously was indexed against AWOTE in \$5,000 increments.

From 1 July 2026 the low rate cap is fixed at \$260,000.

Configurations required:

Actions: N/A

Update medicare levy upper thresholds.

Module: Legislation

Reference: 96502

Details: The upper thresholds for the medicare levy have been updated. These were provided by the ATO on the 30th of June, so were unable to be included as part of the 1 July legislative update.

Configurations required:

Actions: N/A

Update HELP debt rates for 2026/27

Module: Legislation

Reference: 96479

Details: Have updated the HELP debt repayment thresholds and rates to reflect the 2026/27 changes

Configurations required:

Actions: N/A