

AdviceOS Release 2 (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 20/07/2026, 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

Enhancing the Email reminders in Task

Module: Emails

Reference: 96097

Details: Introduced new functionality within the task templates. This allows a user to set up an additional reminder email to be sent to the owner of the task when a task is overdue. The dates range from 1 day to 2 weeks after the due date of the task.

Additionally, there is an optional selection that allows the Leader position for the respective client to be cc'd into the email reminder so that they are also alerted by the overdue task.

All pre-existing task templates will be set to 'None'

Configurations required:

Actions: N/A

New table minicodes for CC & NCC caps

Module: Minicodes

Reference: 96460

Details: New minicodes have been created to capture the last five years concessional and non-concessional contribution caps. These will be displayed dynamically, so that each year they will automatically display the most up to date values.

Configurations required: All Midwinter templates that previous displayed these tables have been updated with the dynamic minicodes. If you wish to include the tables in any templates, these are the minicodes and expected outputs.

Minicodes:

<[RecentConcessionalContributionCaps R]>	
Financial Year	Concessional Contribution Cap
<[Label]>	<[Value C0]>

<[RecentNonConcessionalContributionCaps R]>	
Financial Year	Non-Concessional Contribution Cap
<[Label]>	<[Value C0]>

Output:

Financial Year	Concessional Contribution Cap
2022 / 2023	\$27,500
2023 / 2024	\$27,500
2024 / 2025	\$30,000
2025 / 2026	\$30,000
2026 / 2027	\$32,500

Financial Year	Non-Concessional Contribution Cap
2022 / 2023	\$110,000
2023 / 2024	\$110,000
2024 / 2025	\$120,000
2025 / 2026	\$120,000
2026 / 2027	\$130,000

Actions: N/A

Issues Resolved

Morningstar Missing/Old Data - 42237865539

Module: Midwinter.AdviceOS

Reference: 96129

Details: An issue was identified where some funds were displaying outdated performance data due to the monthly Morningstar refresh process not correctly updating existing fund records. A fix has been implemented to ensure performance data is refreshed accurately during each monthly update.

Configurations required:

Actions: N/A