

AdviceOS Release 2 (June 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 Release 2 (June 2026)	1
AdviceOS	2
Enhancements	2
Centrelink Updates - 1 July 2026	2
Better Targeted Super Concessions for \$3m & \$10m balances - Additional work	3
Update contribution worksheet to 2026/27 financial year	3

AdviceOS

In preparation for our release scheduled for the evening of 22 Jun 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

Centrelink Updates - 1 July 2026	
Module: Financial calculations	Reference: 93465
Details: Social Security thresholds and rates have been updated for the new financial year 2026/27. These changes will be part of the June R2 release however will go live the morning of 1 July 2026.	
Key changes include:	
<ul style="list-style-type: none">• Family Tax Benefit (Part A) Rates & Thresholds• Family Tax Benefit (Part B) Rates• Age Pension asset & income test thresholds• JobSeeker asset thresholds• Deeming thresholds• Medicare Levy & Medicare Levy Surcharge	
Configurations required: N/A	
Actions: N/A	

Better Targeted Super Concessions for \$3m & \$10m balances - Additional work

Module: Financial calculations

Reference: 95846

Details: Work has been completed to all AdviceOS calculators that model superannuation balances to cater for the upcoming Division 296 tax.

While majority of this work was completed in the June R1 release under TFS 95449, additional work was required to finalise these changes for the specific Retirement journey in the digital module. This has now been implemented.

Configurations required: N/A

Actions: N/A

Update contribution worksheet to 2026/27 financial year

Module: Financial calculations

Reference: 95960

Details: AdviceOS contributions worksheet updated to reflect the new financial year for 2026/27.

Changes include:

- Update of current financial year and default view
- Updated calculations for the transfer balance cap
- Updated concessional catch-up logic for 2026/27
- Updated non-concessional contribution bring forward information

Configurations required: N/A

Actions: N/A

