

AdviceOS Release 2 (Mar 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 16 Mar 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

Pre- Retirement Deficit & Surplus Allocation

Module: Retirement Module

Reference: 70658

Details: Made minor adjustments to the investment strategies dialog within retirement module to clearly indicate the changes that would be made when pressing the reset button.

Configurations required: N/A

Actions: N/A

ASFA Retirement Numbers Updated - Dec Quarter 2025

Module: Modelling

Reference: 93469

Details: The ASFA Retirement Standard living standards have been updated for the Dec 2025 quarter.

Configurations required: N/A

Actions: N/A

Centrelink & Deeming Rate Updates – 20th Mar 2026

Module: Settings, Modelling

Reference: 91753

Details: Centrelink indexation rates/ thresholds and Deeming rates will be updated from 20th March 2026.

Details of the changes are shown below.

Current				20 Mar 2026			
Pension Tests				Pension Tests			
Asset Tests	Full Pension	Part Pension		Asset Tests	Full Pension	Part Pension	
Single homeowner	\$321,500	\$714,500		Single homeowner	\$321,500	\$722,000	
Single non-homeowner	\$579,500	\$972,500		Single non-homeowner	\$579,500	\$980,000	
Couple homeowner	\$481,500	\$1,074,000		Couple homeowner	\$481,500	\$1,082,000	
Couple non-homeowner	\$739,500	\$1,332,000		Couple non-homeowner	\$739,500	\$1,340,000	
Illness-separated couple homeowner	\$481,500	\$1,267,500		Illness-separated couple homeowner	\$481,500	\$1,282,500	
Illness-separated couple non-homeowner	\$739,500	\$1,525,500		Illness-separated couple non-homeowner	\$739,500	\$1,540,500	
Pension Rates				Pension Rates			
Basic Rates (per fortnight)	Pension Rate	Supplement (inc. energy supplement)	Energy Supplement	Basic Rates (per fortnight)	Pension Rate	Supplement (inc. energy supplement)	Energy Supplement
Single	\$1,579.76	\$99.00	\$14.10	Single	\$1,100.30	\$100.60	\$14.10
Couple	\$1,627.80	\$149.20	\$21.20	Couple	\$1,658.80	\$151.60	\$21.20
Illness-separated couple	\$2,150.40	\$188.00	\$28.20	Illness-separated couple	\$2,200.60	\$201.20	\$28.20
Minimum Supplements				Minimum Supplements			
	Base Supplement	Including Energy Supplement			Base Supplement	Including Energy Supplement	
Single	\$45.00	\$59.70		Single	\$40.00	\$50.70	
Couple	\$68.00	\$90.00		Couple	\$70.20	\$81.40	
Illness-separated couple	\$91.20	\$119.40		Illness-separated couple	\$93.20	\$121.40	
JobSeeker				JobSeeker			
Family Situation	Allowance Rate (including energy supplement)			Family Situation	Allowance Rate (including energy supplement)		
Single	\$832.40			Single	\$817.20		
Single with dependants	\$859.40			Single with dependants	\$875.90		
Couple (each)	\$734.40			Couple (each)	\$749.20		
Family Situation				Family Situation			
	Income Limit				Income Limit		
Single	\$1,505.00			Single	\$1,531.17		
Single with dependants	\$1,600.00			Single with dependants	\$1,626.84		
Couple (each)	\$1,391.67			Couple (each)	\$1,414.67		
Deeming Rates				Deeming Rates			
	Threshold	Below	Above		Threshold	Below	Above
Single	\$64,200	0.75	2.75	Single	\$64,200	1.25	3.25
Couple	\$100,700	0.75	2.75	Couple	\$100,700	1.25	3.25
Rent Assistance				Rent Assistance			
Family Situation	Maximum Payment			Family Situation	Maximum Payment		
Single	\$215.40			Single	\$219.40		
Couple	\$103.00			Couple	\$106.80		
1 or 2 children	\$223.12			1 or 2 children	\$227.88		
3 or more children	\$286.02			3 or more children	\$291.48		

There is now a dropdown in the top right corner of the Centrelink Settings page that can be used to view the future (March 20th) rates ahead of time. Selecting a future date (March 20th) will display the rates that will be in effect from that date.

Commonwealth Seniors Health Card	
Family Situation	Income Test Threshold
Single	\$101,105.00
Couple	\$161,768.00
Illness-separated couple	\$202,210.00
Addition per dependant	\$639.60

Legislative Rates: Current

Income Test Threshold: Current

Income Test Threshold: Future (20 March 2026)

Once the rates take effect (on March 20th), the dropdown will disappear.

Configurations required: N/A

Actions: N/A

SOA Cashflow Table- Tax

Module: Templates

Reference: 93754

Details: Added fields for Company dividends, Company imputation credits, Trust distribution received and Trust imputation credits within the Midwinter SOA template in the Tax table within the Cashflow and Capital section. The changes ensures that the total value of the assessable income is reflected correctly in the SOA.

Configurations required: N/A

Actions: N/A

Issues resolved

Resolved- Application Error for Adding Multiple Super & Pension Products

Module: Fact Find

Reference: 93410

Details: An issue affecting the Client- Fact Find- Super, Pensions and Investments section has been resolved. Previously, users encountered an application error when attempting to add multiple entries and selecting Load. Users can now successfully add multiple entries within Super, Pensions and Investments.

Configurations required: N/A

Actions: N/A

Dynamic Fact Find

This sprint includes internal updates and improvements that do not impact end- user functionality. No user- facing changes have been introduced as part of this release.