

AdviceOS Release 1 (May 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 1 (May 2026)	1
AdviceOS	2
Enhancements	2
Alphabetically order Adviser and Office dropdowns	2
Fundbase update for Telstra Super Products.....	2
Digital – Angular Version Update.....	3
Issues resolved	4
Retirement - Recommended Capital Retirement Module Graph values vs Table details.....	4
DFF Formatting Errors	5

AdviceOS

In preparation for our release scheduled for the evening of 11 May 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

Alphabetically order Adviser and Office dropdowns

Module: Fact Find and Planbuilder

Reference: 94834

Details: The following two dropdown lists now display their entries in alphabetical order:

- **Office** Dropdown located at **Client > Fact Find > Personal Details**
- **Adviser** Dropdown located at **Modelling > PlanBuilder > SOA Management**

Configurations required: N/A

Actions: N/A

Fundbase update for Telstra Super Products

Module: Fundbase

Reference: 95013

Details: The following platforms are now closed.

- TelstraSuper Corporate Plus
- TelstraSuper Personal Plus
- TelstraSuper Defined Benefit Division 5 VAA
- TelstraSuper Division 5 Defined Benefit
- TelstraSuper Division 5 VAA

Configurations required: N/A

Actions: N/A

Digital – Angular Version Update

Module: Digital

Reference: 92225

Details: Our Digital solution has been updated to **Angular v21**, delivering improved performance, security, and stability. No user-facing changes are expected as part of this upgrade.

Configurations required: N/A

Actions: N/A

Issues resolved

Retirement - Recommended Capital Retirement Module Graph values vs Table details

Module: Retirement

Reference: 94568

Details: To address an issue where the Recommended table did not align with the graph projections in the AOS retirement modelling, we have implemented a fix to ensure consistency between the two outputs.

Previously, when users created or used an account with a spouse, entered investment details, set income requirements, and selected "deficit allocation as other" under advanced settings, the graph correctly displayed the projection and utilization of the deficit as "other (investment)." However, the table underneath did not match the values shown in the graph, leading to discrepancies in the reported investment versus surplus/deficit values post-retirement and after super balances were exhausted.

As a fix, the system now ensures that the table values are synchronized with the graph projections. This alignment guarantees that both the visual and tabular representations of recommended capital accurately reflect the selected deficit allocation and investment scenarios, providing users with consistent and reliable retirement modelling results.

Configurations required: N/A

Actions: N/A

DFF Formatting Errors

Module: Dynamic Fact Find

Reference: 94069

Details: A fix has been applied to address formatting issues for both UI and generated PDFs when text size is adjusted in the Edge browser.

Configurations required: N/A

Actions: N/A