

AdviceOS Release 2 (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:

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AdviceOS

In preparation for our release scheduled for the evening of 25 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

Update to SG Maximum Contributions Base

Module: Financial calculations

Reference: 95261

Details: The calculation of the projected maximum contributions base has been updated to align with the new formula linked to the concessional contributions cap and SG rate.

The new formula is equal to Concessional Contribution Cap / SG Rate (rounded to nearest \$10)

Configurations required: N/A

Actions: A new minicode has been created to capture the annual maximum contribution base, which can replace the previous minicode that provided the value as a quarterly amount.

Existing Minicode (quarterly value): <[MaximumSuperContributionBase|C0]>

New Minicode (annual value): <[MaximumAnnualSuperContributionBase|C0]>

Update to SAPTO Thresholds FY27 & FY28

Module: Financial calculations

Reference: 95312

Details: With the reduction in the lowest marginal tax rate, the SAPTO thresholds has been updated to reflect the changes in FY27 & FY28

Configurations required: N/A

Actions: N/A