

AdviceOS Release 2 (Nov 2025)

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 24 Nov 2025, 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

Morningstar Transition from Licensed Data Feed (LDF 2.5) to Global Solution

Module: Other

Reference: 82382

Details: Morningstar has recently introduced an improved solution to their data feeds, that offers enhanced performance, faster data delivery and improved reliability. This has meant that AdviceOS has moved away from their older Licensed Data Feed (LDF 2.5) to their new Global Solution Web Service.

This impacts how we integrate the Morningstar data, research and reports into AdviceOS using their API services.

Work has been completed by our development team and part of the November R2 release will be to move over to the new Global Solution.

These changes are internal only, and there should be no change to your experience with AdviceOS and any data we receive from Morningstar, which includes unit pricing, research and reporting. However, if you do experience any issues with these after the release, please reach out to our support team.

Configurations required: N/A

Actions: N/A

Request New Fields into Client Report

Module: Reporting

Reference: 90957

Details: Have included two new fields to the Client report, that are sourced from information within the Fact Find > Objectives section of Fact Find.

- Retirement date
- Target income

Configurations required: N/A

Actions: N/A

Restricting Age of Voluntary Contributions (CC & NCC)	
Module: Cashflow & Capital, Retirement	Reference: 90371
<p>Details: Based on the ATO specifications, in the 28 days after the end of the month in which an individual turns 75 a superfund can accept voluntary contributions. Applied a restriction to voluntary contributions for clients, so that these contributions can only be accepted up to and including the month after an individual turns 75.</p> <p>This restriction is not applied to compulsory employer contributions & downsizer contributions.</p> <p>This change is currently applied to Cashflow & Capital and Retirement modules, and will be implemented for Contribution Optimiser & Transitions modules in the upcoming releases.</p>	
Configurations required: N/A	
Actions: N/A	

Issues resolved

Unable to Download Document	
Module: Client Records	Reference: 90686
<p>Details: When some AdviceOS users tried to download files, they encountered an error stating the file was pending a malware scan. Investigation revealed that a new file-version record had been created and linked to an existing S3 file - without any new upload - due to a modification in the database. This new record, created in September 2025 (after the malware-scan feature was implemented), updated the file's "last modified" date but did not assign a malware-status tag. Because the system was checking the file's original upload date to decide whether to scan, no new scan was triggered, leaving the malware-status tag blank and blocking the download.</p> <p>The system has now been updated to trigger a malware scan whenever a file record is modified (using the last-modified date), ensuring older files created before the scan feature existed are also scanned and can be downloaded.</p>	
Configurations required: N/A	
Actions: N/A	

Generate API Key Function Unintended Deletion Fix

Module: Settings

Reference: 90489

Details: An issue was identified with the Generate API key functionality. An existing non-user generated Licensee or Practice key could be unintentionally deleted when generating an API key for the same Licensee or Practice. This has now been resolved.

Configurations required: N/A

Actions: N/A

Fixed- Negative Concessional Contribution Amounts

Module: Contribution Optimiser

Reference: 90492

Details: It was identified that in certain couple scenarios, where the concessional contribution amount was lower than the non-concessional contribution amount in a particular projection year, the Contribution Optimiser displayed a negative concessional contribution value.

This calculation logic has now been updated to prevent concessional contributions from falling below zero.

Configurations required: N/A

Actions: N/A

Dynamic Fact Find

As part of the scheduled release on the evening of 26 Nov 2025, please review the following items outlining changes that will impact the Dynamic Fact Find module.

Enhancements

Added Rental Income as Joint Income	
Module: Dynamic Fact Find	Reference: 90975
Details: The joint income field options in the Dynamic Fact Find have been updated to align with the options available in the AOS Fact Find, ensuring consistency across both platforms.	
Configurations Required: N/A	
Actions: N/A	