

Brookfield

Redefining Alternative Investments

privatewealth.brookfield.com



Delivering the highest-quality alternative solutions, insights and partnership to advisors and their clients—backed by our global expertise in real assets and credit.

Brookfield is one of the world's largest alternative asset managers, with unparalleled investment experience across real assets and credit.

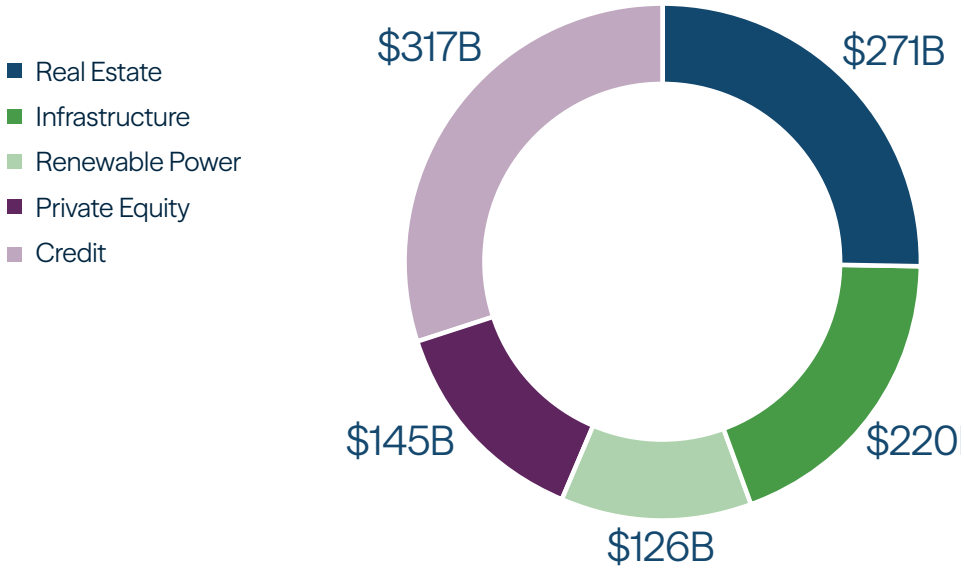
Real assets, such as real estate and infrastructure, tend to generate strong, steady income and produce cash flows that adjust with inflation. They are often backed by long-term contracts, and the highest-quality properties tend to be scarce—making them more likely to appreciate quickly. These characteristics can provide investors with attractive returns with downside protection.

Alternative credit strategies can serve as a substitute for traditional fixed income. Like real assets, bonds, convertible securities, leveraged loans, structured credit instruments, private debt and distressed debt can all provide strong, consistent returns while limiting downside risk.

At Brookfield, we have a long-term, value-driven and contrarian investment style—and our market knowledge and in-depth operating experience give us an edge.

$1+ Trillion in AUM*

Brookfield



As of December 31, 2025.

* Excludes proportionate amount of DoubleLine Capital AUM.

Rooted in History. Focused on the Future.

At Brookfield, we've been owning and operating real assets for over 125 years, building a legacy of strength, scale and performance.

Our global reach, access to large-scale capital, and deep operational expertise drive every investment we make. Through our acquisition of Oaktree and other strategic partnerships, we've established ourselves as a leading global credit manager with unmatched breadth and depth across markets. The success of our platform is built on a foundation of experience, innovation and an unwavering commitment to delivering value for our clients around the world.

1890s

1899
The São Paulo Tramway, Light and Power Company—aka "The Light"—is founded

1950s

1954
Montreal-based Peter Bronfman founds Edper Investments from the sale of Seagram Company shares

1960s

1969
The Light rebrands as Brascan, a blend of "Brasil" and "Canada"

1970s

1979
Edper acquires control of Brascan

1980s

1983
Howard Marks is joined by Sheldon Stone at Citi, focusing on credit analysis and managing high-yield bonds

1985
Howard and Sheldon move from Citi to TCW and establish the firm's high-yield bond department

1987
Bruce Karsh joins TCW to establish Special Credits funds for distressed debt investing

1989
Brookfield Public Securities Group is created

At Brookfield we partner with financial advisors to bring institutional-caliber alternative solutions and insights to individual investors.

1990s

1990
Brascan acquires a portfolio of distressed real estate, kicking off a major U.S. expansion

Howard writes his first investment memo, stating: "If you can avoid the losers (and losing years), the winners will take care of themselves"

1995
Howard, Bruce and Sheldon found Oaktree Capital Management

2000s

2001
Under Bruce Flatt's leadership, Brookfield closes its inaugural private equity fund

2005
Brascan is renamed Brookfield Asset Management

2010s

2010
Brookfield closes its $2.7 billion initial flagship global private infrastructure fund

2013
Brookfield closes its $4.4 billion initial flagship global private real estate fund

Barron's names Howard "Wall Street's Favorite Guru" on its cover

2018
Brookfield and LCM Partners enter into a strategic partnership

2019
Brookfield announces it will buy 62% of Oaktree

2020s

2020
Oaktree celebrates its 25-year anniversary

2021
Brookfield launches its initial flagship fund for investing in and facilitating the global shift to a net-zero-carbon economy

Brookfield and Oaktree partner to establish Brookfield Oaktree Wealth Solutions

2022
Brookfield and Primary Wave enter into a strategic partnership

2023
Brookfield and Sequoia Heritage back the creation of Pinegrove Capital Partners

2024
Brookfield and Castlelake, L.P. complete a strategic transaction

2025
Brookfield and Angel Oak announce a strategic partnership

2026
Brookfield acquires remaining interest in Oaktree

Our Solutions

Adding alternatives to a traditional portfolio of equities and bonds can provide greater income potential, capital appreciation, inflation protection and diversification. It's no wonder, then, that investor demand for alternatives has been rising for decades.

Yet not all alternative investments are created equal. Successful investment in alternative assets requires scale, operational expertise and experience through market cycles. Brookfield's powerful platform makes us the ideal provider for individual investors seeking access to high-quality alternatives.

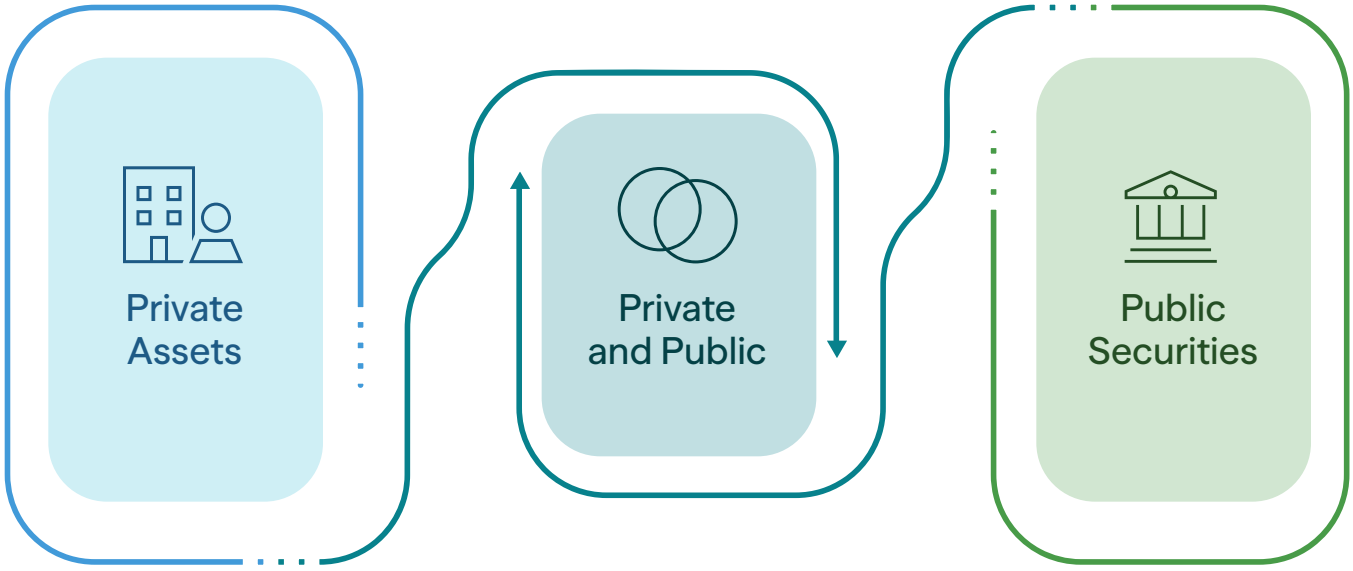
Some may look to the public markets to meet liquidity needs and overcome access constraints, while others may turn to the private markets. Across public and private markets, we develop innovative solutions for individual investors, leveraging our strengths.



Diversification does not ensure a profit or protect against loss in a declining market.

Our Strengths, Delivered Across a Broad Array of Solutions

Innovative Solutions



Our platform offers wealth clients innovative alternative solutions that capitalize on the strengths only we can deliver.

Insights to Inform and Engage

Actionable content to encourage conversations and help investors understand the benefits of alternatives in an overall portfolio.



Our Partnership With You

Our global footprint and institutional expertise provide us with unique perspectives on investors' needs. In fact, many of the largest investors worldwide already invest with us.

We are now offering our institutional-caliber solutions to individual investors. We aim to build trusted, long-term partnerships with financial advisors, providing the highest level of service to help you and your clients.

The Brookfield Advantage



Alternative solutions focused on investors' needs



Product and portfolio expertise



Valuable market and investment insights



Strong and trusted brands



Operational ease and excellence

Brookfield

Contact Us

Our dedicated team is ready to work directly with you.

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