



Brookfield and iCapital® Unveils Alts Allocator Tool to Help Advisors Model Impacts of Alternatives in Client Portfolios

NEW YORK – November 11, 2025 –Brookfield today announced its private wealth platform has partnered with [iCapital](#)¹ to launch a new interactive asset allocation tool for financial advisors and their clients. Powered by [iCapital Architect](#), “Alts Allocator” utilizes three research-based high-net-worth investor profiles to illustrate how adding alternative investments to a traditional 60/40 portfolio can enhance diversification and improve potential investment outcomes.

The “Alts Allocator” model analysis is built upon three [alts investor personalities](#): Traditionalist, Emerging Adopter, and Alts Champion, which were developed through proprietary data from Brookfield’s 2024 [Alts Institute Alternative Investing Survey](#). Users can then opt to create custom portfolios from asset classes, including infrastructure, real estate, private equity, and private credit, and compare them to the benchmark of their choice.

This launch comes at a time when advisor interest in alternatives is surging. According to iCapital’s [2025 Global Advisor Survey](#), 96% of advisors plan to maintain or increase their allocation to alternatives this year. “Alts Allocator” is designed to meet this demand by helping advisors model the potential impact of alternatives in client portfolios with greater clarity and confidence.

John Sweeney, CEO of Brookfield’s private wealth business, said, “Equipping advisors with the resources they need to meaningfully engage clients around alternative investing is critical. Our Alts Institute research study revealed that investors increasingly view alternatives as an essential part of a portfolio strategy and believe that having an alternatives allocation may contribute to long-term outcomes compared to a traditional portfolio. ‘Alts Allocator’ gives advisors a powerful way to demonstrate the benefits of alternatives while meeting clients where they are.”

iCapital Architect—the portfolio construction tool powering “Alts Allocator”—is part of iCapital’s modular suite of solutions built to simplify the integration of alternative investments. Architect reflects iCapital’s commitment to delivering scalable, data-driven tools that elevate the advisor experience and foster meaningful client engagement. Through its collaboration with Brookfield, iCapital continues to help wealth managers navigate complexity, educate their clients, and support the integration of alternatives in client portfolios.

¹ iCapital, Inc. and its affiliates (together, “iCapital”)

“Our collaboration with Brookfield is focused on helping address some of the real-world challenges advisors face in portfolio construction,” said Dan Vene, Co-Founder and Co-Head of iCapital Solutions at iCapital. “Powered by Architect, ‘Alts Allocator’ helps advisors evaluate the impact of allocating to alternatives in client portfolios—enabling them to assess asset performance with greater precision, make confident recommendations, and engage in more personalized, insight-driven conversations that build trust and drive better outcomes.”

The launch of “Alts Allocator” is part of a broader initiative by [The Alts Institute](#) to arm advisors with the tools and resources needed to take advantage of the opportunities in alternatives. The Alts Institute houses a readily accessible, action-oriented library of foundational alternatives content, marketplace insights and original research from Brookfield. It is designed to help advisors build client confidence in alternatives and deepen conversations around investing needs and motivations. To learn more about “Alts Allocator”, please [explore the tool](#).

To learn more about how Architect delivers institutional-grade intelligence to wealth managers, visit the [latest resources and insights here](#).

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About Brookfield Asset Management

Brookfield Asset Management Ltd. (NYSE: BAM, TSX: BAM) is a leading global alternative asset manager, headquartered in New York, with over \$1 trillion of assets under management across renewable power and transition, infrastructure, private equity, real estate, and credit. We invest client capital for the long-term with a focus on real assets and essential service businesses that form the backbone of the global economy. We offer a range of alternative investment products to investors around the world — including public and private pension plans, endowments and foundations, sovereign wealth funds, financial institutions, insurance companies and private wealth investors. We draw on Brookfield’s heritage as an owner and operator to invest for value and generate strong returns for our clients, across economic cycles. For more information, please visit our website at www.bam.brookfield.com.

About iCapital

iCapital is a global leader, shaping the future of global investing for financial advisors, wealth managers, asset managers, and other industry participants. iCapital offers a diverse and complete range of non-traditional investment products on iCapital Marketplace, Enterprise Solutions, and both Technology and Data Services, designed to help drive better outcomes² for all participants in the ecosystem.

With strategic investment from leading alternative asset managers, wealth managers, and service providers globally, iCapital provides unrivaled access, data connectivity, education, and research programs to advisors and their clients. Leveraging AI and machine learning for digital identity (KYC/AML), iCapital supports compliant and secure investment lifecycle processes.

iCapital's end-to-end platform manages the lifecycle of non-traditional investment products, making it easier to learn about, buy, manage, and integrate alternative assets, structured investments, and annuities into portfolios, driving growth, scale, and efficiency. Our solution(s) can be customized and offers specific modules as needed.

² iCapital delivers better outcomes by streamlining financial operations, enhancing technology infrastructure, and empowering smarter decision-making through reporting and analytics.

iCapital has \$999.7³ billion of assets serviced globally on its platform, including \$272.1 billion in alternative platform assets, \$214.9 billion in structured investments and annuities outstanding, and \$512.7 billion in client assets reported on, and serves over 3,000 wealth management firms and 118,000 active financial professionals.

Headquartered in New York, iCapital operates globally with 16 offices, including major hubs in Zurich, London, Hong Kong, Singapore, Tokyo, and Toronto, and an industry-leading R&D center in Lisbon. iCapital is [recognized for its innovation and leadership](#) with accolades from Euromoney (World's Best Technology Provider for Wealth Management), CNBC (World Top Fintech Companies), The Wealthies Alts Investment Platform of the Year, and Forbes Fintech 50.

For more information, visit <https://icapital.com> | X (Twitter): [@icapitalnetwork](#) | LinkedIn: <https://www.linkedin.com/company/icapital-network-inc>

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³ As of August 31, 2025