

Introducing the Alts Allocator

The Alts Allocator, powered by iCapital Architect, makes it easy to model, build and compare portfolios that showcase how alternative investments can strengthen long-term outcomes. Users can explore portfolios aligned with three distinct investor personas—each shaped by insights from the Alts Institute Alternative Investing Survey. You can also customize your own portfolio to reflect specific goals and preferences.

TRY THE ALTS ALLOCATOR



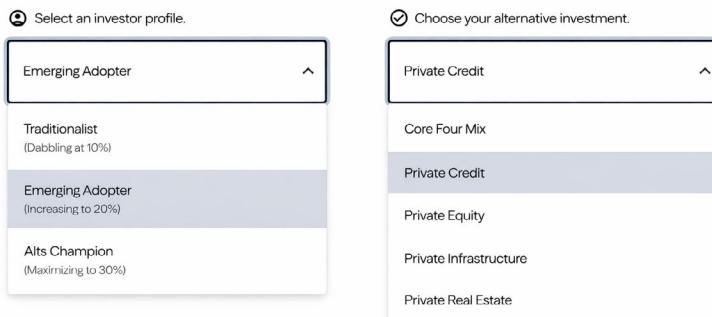
Start Using the Alts Allocator in Three Steps

The Alts Allocator offers a seamless, interactive experience through model portfolios or a custom portfolio constructed from a menu of indexes.

Our **Core Four Mix** is the most straightforward and quickest way to get started. In just three steps, compare a traditional 60/40 portfolio to a portfolio that includes an equal allocation of private credit, private equity, private infrastructure, and private real estate.

- ① From the **Portfolio Analysis** tab, choose the investor profile that matches your target allocation to alternatives in your total portfolio.
- ② Choose **Core Four Mix** from the drop-down menu.

Investor Profile



The screenshot shows two dropdown menus. The first dropdown, 'Select an investor profile', has 'Emerging Adopter' selected. The second dropdown, 'Choose your alternative investment', has 'Private Credit' selected, with 'Core Four Mix' highlighted in grey.

Investor Profile
Traditionalist (Dabbling at 10%)
Emerging Adopter (Increasing to 20%)
Alts Champion (Maximizing to 30%)

Alternative Investment
Private Credit
Core Four Mix
Private Equity
Private Infrastructure
Private Real Estate

To explore models beyond the Core Four Mix, select an individual alts category from the list.

- ③ Click **Get Analysis Report** to download or share your model comparison.

Introducing the Alts Allocator

Customize Your Analysis

- ① Toggle to the **Custom Analysis** tab and click on **Create Custom Portfolio**.
- ② Select asset classes to add to the portfolio from the list of **indexes**.
- ③ Edit the dollar amount and select the check mark, or hit return on your keyboard, to save the desired allocation. When finished adding allocations, click on **Conclude and Analyze**.
- ④ Under **Analysis**, select **Allocations**, **Hypothetical Performance** and **Scenarios** to compare the results to predefined portfolios.
- ⑤ Click on **Get Analysis Report** to download or share your model comparison.

Analysis

[Get Analysis Report](#)

Allocations Hypothetical Performance Scenarios

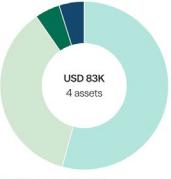
Allocations¹
 View the asset class allocation breakdown.

60% Equities / 40% Fixed Income Custom Portfolio



USD 1M
2 assets

60% Equity
40% Fixed Income



USD 83K
4 assets

54.2% Public Equities
36.1% Fixed Income
4.8% Private Credit
4.8% Private Real Estate

Hypothetical Performance²
 View portfolio returns, volatility, drawdown, and potential \$100,000 value changes based on historical index returns.
 Please refer to the disclosures below for additional information.

① 3Y 5Y Max

	CUMULATIVE RETURN ⁴	ANNUALIZED RETURN ⁴	ANNUALIZED VOLATILITY ⁴	MAX DRAWDOWN ⁴ Dec 2007 - Mar 2009	SHARPE RATIO ⁷
60% Equities... 2003 - 2025	371.4%	71%	11.2%	-316%	0.48
Custom Por... 2003 - 2025	462.7% ↑ 91.3%	8.1% ↑ 1%	9.0% ↓ -2.2%	-27.3% 4.3%	0.70 ↑ 0.22

Create custom portfolio

Custom portfolio	\$83,000
<hr/>	
4 HOLDINGS	
Private Credit	
<input checked="" type="radio"/> Private Credit \$ 4,000	
<hr/>	
Private Real Estate	
<input checked="" type="radio"/> Private Real Estate \$4,000	
<hr/>	
Public Equities	
<input checked="" type="radio"/> US Large Cap Equity \$45,000	
<hr/>	
Fixed Income	
<input checked="" type="radio"/> Core Fixed Income \$30,000	

Contact us at **1.855.777.8001** to schedule an Alts Allocator walk-through with one of our specialists.

Introducing the Alts Allocator

Disclosure

Any analysis or information presented is intended for illustrative purposes only and should not be relied upon as a forecast, prediction, projection, guarantee, research, recommendation or advice of any kind, including investment, tax, accounting or legal advice. Nothing herein is intended to be a recommendation of any specific security or investment strategy or to meet the investment objectives or needs of any specific investor. Any decision based upon the output and information contained on the Alts Allocator are the sole responsibility of the user.

Sample portfolios are for illustrative purposes only, and they do not represent all possible investment objectives.

Brookfield commissioned CoreData Research to conduct separate online surveys of 300 financial professionals with an average practice AUM of US \$633 million in the U.S. and Canada and 625 high-net-worth investors with at least US \$2.5 million in household investable assets in the U.S., Canada, Hong Kong, Singapore and Taiwan between April and June 2024. The results were published under the title The Alts Institute Alternative Investing Survey.

Important Information

Alternative investments are complex, speculative investment vehicles and are not suitable for all investors. An investment in an alternative investment entails a high degree of risk, and no assurance can be given that any alternative investment fund's investment objectives will be achieved or that investors will receive a return of their capital.

As an asset class, private credit encompasses a large variety of different debt instruments. While each has its own risk and return profile, private credit assets generally have increased risk of default, due to their typical opportunistic focus on companies with limited funding options, in comparison with their public equivalents.

Because private credit usually involves lending to below-investment-grade or non-rated issuers, yield on private credit assets is increased in return for taking on increased risk.

Investments in real estate-related instruments may be affected by economic, legal or environmental factors that affect property values, rents or occupancies of real estate.

The information contained herein is for educational and informational purposes only and does not constitute, and should not be construed as, an offer to sell, or a solicitation of an offer to buy, any securities or related financial instruments. It is not intended to provide an overview of the terms applicable to any products sponsored by Brookfield Corporation and its affiliates (together, "Brookfield"). Information and views are subject to change without notice. Some of the information provided herein has been prepared based on Brookfield's internal research, and certain information is based on various assumptions made by Brookfield, any of which may prove to be incorrect. Brookfield may not have verified (and disclaims any obligation to verify) the accuracy or completeness of any information included herein, including information that has been provided by third parties, and you cannot rely on Brookfield as having verified any of the information.

Forward-Looking Statements

Information herein contains, includes or is based on forward-looking statements within the meaning of the federal securities laws, specifically Section 21E of the Securities Exchange Act of 1934, as amended, and Canadian securities laws. Forward-looking statements include all statements, other than statements of historical fact, that address future activities, events or developments, including, without limitation, business or investment strategy or measures to implement strategy, competitive strengths, goals, expansion and growth of our business, plans, prospects and references to our future success. You can identify these statements by the fact that they do not relate strictly to historical or current facts. Words such as "anticipate," "estimate," "expect," "project," "intend," "plan," "believe" and other similar words are intended to identify these forward-looking statements. Forward-looking statements can be affected by inaccurate assumptions or by known or unknown risks and uncertainties. Many such factors will be important in determining our actual future results or outcomes. Consequently, no forward-looking statement can be guaranteed. Our actual results or outcomes may vary materially. Given these uncertainties, you should not place undue reliance on these forward-looking statements.

Brookfield Private Wealth LLC is a wholly owned subsidiary of Brookfield. Brookfield Private Wealth LLC is registered as a broker-dealer with the U.S. Securities and Exchange Commission (SEC) and is a member of FINRA and the Securities Investor Protection Corporation (SIPC).

© 2026 Brookfield

ID B837941

Contact Us

-  privatewealth.brookfield.com
-  privatewealth@brookfield.com
-  Follow us on LinkedIn