

Unlocking the Opportunity: Advisors Serve as a Bridge to Furthering Women's Strong Alternatives Adoption and Interest

As the Great Wealth Transfer stands to empower generations of women investors, Brookfield's survey of high-net-worth investors in Singapore, Hong Kong and Taiwan reveals that women are turning to alternatives as a key driver of stronger long-term outcomes and a foundational element of a successful portfolio strategy.

Committed to increasing their allocation to alternatives moving forward, women are looking to their advisors to align their disciplined, growth-oriented investment approach with a portfolio strategy that takes advantage of the growing opportunities in the alternatives space.



Most female investors say their risk tolerance is moderate or slightly aggressive, and diversification is crucial to managing risk in their portfolio.

33%

of women describe their investment risk tolerance as moderate and 32% say it is slightly aggressive

94%

believe diversification* is a crucial aspect of managing risk in their portfolio

92%

of women would like to invest in strategies/investments that capitalize on forward-looking macro trend



Women's focus on asset growth and the long term may make them well-suited for alternative investments.

- 66% of women say accumulation/asset growth is the primary focus of their investment portfolio
- When it comes to investing, 91% of women are primarily focused on the long term, and 90% are willing to ride out volatility to achieve their goals
- Top attributes when evaluating investments include growth (59%), income (56%) and diversification (49%)
- 75% are unlikely to need to withdraw a substantial amount of invested capital to meet their short-term cash needs
- Consistent with women's disciplined approach, 83% are comfortable with investments that limit their ability to redeem in order to protect outcomes, as long as they can eventually redeem in a reasonable time frame

* Diversification does not guarantee a profit or protect against loss.



The vast majority of women own alternative investments—they report high satisfaction with these investments and an intention to grow their alternatives allocation.

- Portfolio allocation for female respondents:

Stocks **35%** | Bonds **23%** | Alternatives **19%** | Cash **23%**

83%

of women have owned an alternative investment

84%

of women who own alts are satisfied with the performance of their alternative investments

84%

of women say alternatives are essential to a successful portfolio strategy

86%

of women believe that having an alternatives allocation will drive stronger long-term outcomes than a traditional portfolio

81%

of women are open to investing/investing more into alternatives, and among alts users, 84% are open to investing in other alternatives they don't currently hold

72%

say the outcomes alternative investments generate are worth the fees



Female investors are looking to increase their exposure to alternatives and want their advisor to serve as a partner in this effort.

When asked how high of an alternatives allocation they would be comfortable with provided their advisor strongly recommended it, 41% of women say more than 25%, followed by 22% who said 22–25%

72%

of women expect their overall alternatives allocations to increase over the next one to two years, with evergreen structures leading the way, as 65% of women expect an increase over this time period

89%

of women want their advisor to stay ahead of the curve on new alternative investment opportunities

89%

of women want their advisor to speak to them more about alternatives

55%

of women have moved or would consider moving to a new advisor in order to better access high-quality alternatives



By leading with education and strategies that align with women's investing approach, advisors can continue to build upon women's strong interest in this growing asset class.

- Among alts users, 89% of women would invest more in alternatives if they better understood their role in a portfolio
- 87% trust their advisor to make the right decisions on alts, but still want to understand what they are invested in
- 88% of alts users would invest more in alternatives if they better understood the available options
- 85% of women would increase their investment in alternatives after demonstrated success
- 76% agree that when trying new types of investments, they prefer to start with the most conservative strategies
- When asked about the types of investment opportunities they are interested in that they currently can't access, women cited semi-liquid funds (50%), private funds (40%) and liquid alts (40%)

The top actions advisors can take to help female investors move forward with an alternative investment opportunity:



Explaining products and/or strategies in depth to build client confidence in their alts expertise (41%)



Focusing on the overall benefits to the portfolio versus the product itself (38%)



Presenting investment opportunities that closely align with their interests (37%)

Demographics

Survey included a total of 106 female respondents in Singapore, Hong Kong and Taiwan

83% hold alternative investments

HOUSEHOLD ASSETS (USD)

50% have \$2.5M–\$5M **15%** have \$5M–\$10M **14%** have \$10M–\$20M **21%** have \$20M+

ADVISOR USAGE

66% use a single financial professional **48%** say their advisor provides ideas/education and they approve all buy/sells

With the Great Wealth Transfer underway, these findings affirm that capturing female investors' interest in private markets starts with the understanding that a risk-averse profile is not a barrier to using alternatives. Those advisors who bridge the knowledge gap and align alternative investing opportunities with female investors' long-term portfolio goals will deepen client trust and differentiate their practice during this pivotal shift in wealth ownership and wealth management.

Discover more resources and insights at [The Alts Institute](#).

Alternatives involve significant risks and may not suit all investors; outcomes are not guaranteed.

Brookfield-commissioned survey of select investors; results may not be representative of the broader investor population.

Survey Methodology

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

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