

Unlocking the Opportunity: Advisors Serve as the Bridge to Greater Alternatives Adoption Among Women

As the Great Wealth Transfer stands to empower generations of female investors, Brookfield's survey of high-net-worth investors reveals a disciplined, long-term perspective on investing that makes most women a strong fit for alternative investments. Despite this alignment, women's alts usage trails their male counterparts' by double digits.

Through education that aligns with how female clients assess and approach risk—notably women's forward-looking view and willingness to ride out volatility—advisors can act as the essential bridge to help female high-net-worth investors take advantage of alternatives.



Many female investors say their risk tolerance is conservative, and most focus on diversification and disciplined investing to manage risk.

87%

of female high-net-worth investors describe their risk tolerance as conservative (43%) or moderate (44%)

92%

of women are willing to ride out an investment's volatility to achieve investment goals over the long term

94%

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



Women's risk discipline and long-term perspective may make them well-suited for alternative investments.

- When it comes to investing, 89% of women are primarily focused on the long term.
- The majority of women would like to invest in a greater variety of investments (e.g., more complex and/or risky investments with the potential for outsize gains) beyond what they already own.
- 80% are unlikely to need to withdraw a substantial amount of invested capital to meet short-term cash needs.
- Consistent with women's disciplined approach, 88% are comfortable with investments that limit their ability to redeem in order to help protect outcomes, as long as they can eventually redeem in a reasonable time frame.

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



Women who own alternative investments report high satisfaction, yet overall adoption among these high-net-worth investors remains relatively low.

95%

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

82%

are open to investing in other alternatives that they don't currently hold

68%

of women are open to investing or investing more into alternatives

59%

of women say alternatives are essential to a successful portfolio strategy

62%

say the outcomes alternative investments generate are worth the fees

71%

agree that some alternative investments have liquidity limits to help protect investor outcomes



Female investors are open to alternatives, but many aren't actively asking for them. Instead, they look to their advisors to lead the way through education that is connected to client goals and demonstrates disciplined, strategic risk management.

Women who are not investing in alts say the top reason they don't own alternatives is that their advisor hasn't discussed it with them, followed by a lack of understanding of alternatives.

69%

of non-users would begin investing in alternatives if their advisor recommended it

74%

of non-users would begin investing in alternatives if their advisor focused on the overall benefits to the portfolio rather than on the product itself

88%

trust their advisor to make the right decisions on alts, but still want to understand what they are invested in

78%

of women would increase their investment in alternatives after demonstrated success

80%

agree that when trying new types of investments, they prefer to start with the most conservative strategies



Mapping the path to private markets: Engage women in a way that acknowledges how they approach the asset class and investing more generally

- 49% of women are not really sure what is considered an alternative investment.
- Among alts users, 71% of women would invest more in alternatives if they better understood their role in their portfolio.
- When asked about types of investment opportunities they are interested in that they can't access, women cited evergreen (54%), private funds (50%), and liquid alts (44%).

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



Explain products and/or strategies in depth to build client confidence in their alts expertise



Show how alternatives can fit with their clients' investment interests/goals



Focus on the overall benefits to the portfolio versus the product itself

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](#).

Survey Demographics

138

total female respondents based in the U.S. and Canada

44%

use alternative investments

HOUSEHOLD ASSETS (USD)

53%

have \$2.5M–\$5M

32%

have \$5M–\$10M

ADVISOR USAGE

77%

use a single financial advisor/wealth manager

46%

say their advisor provides ideas/education and they approve all buys/sells

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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