Press Release

Brookfield

Brookfield's Alts Institute Survey Highlights Growing Interest in Alternative Investments Among Female Investors

Supporting Brookfield's Women & Wealth initiative, findings reveal strong demand for education on alternative investments

NEW YORK – May 19, 2026 – Brookfield today shared new insights for its Alts Institute survey, highlighting strong interest among high-net-worth (HNW) female investors in alternative investments—and the critical role financial advisors play in helping women access and understand these opportunities.

Conducted by CoreData on behalf of Brookfield's private wealth business, the survey examined the attitudes and behaviors of HNW investors in the U.S. and Canada with at least US $2.5 million in household investable assets. The research found that women's disciplined, long-term approach to investing aligns well with alternative investments. Yet despite strong interest and positive sentiment, only 44% currently invest in alternatives, pointing to a significant opportunity for advisors to deepen education and engagement.

Key findings among female HNW investors:

- 94% believe diversification is critical to managing portfolio risk.
- 89% are primarily focused on long-term investing.
- 88% trust their advisor to make the right decisions on alternatives but still want to understand their investments.
- 76% want their advisor to stay ahead of the curve on new alternative investment opportunities.

- *Women already invested in alternatives report high satisfaction levels:*
  - 95% are satisfied with the performance of their alternative investments.
  - 82% are open to investing in additional alternative asset classes that they don't currently own.
  - 68% are interested in increasing their allocation to alternatives.

- *Those who are not invested in alts are open to them:*
  - The top reason non-users cited for not investing in alternatives was that their advisor had not discussed them.
  - 69% said they would begin investing in alternatives if recommended by their advisor.
  - 74% said they would begin investing in alternatives if their advisor focused on the portfolio's overall benefits rather than the product itself.

Brookfield launched its Women & Wealth initiative to help financial advisors navigate the evolving demographic landscape driven by the Great Wealth Transfer and the growing influence of women investors within wealth management. The program provides advisors with actionable insights, educational content and practical strategies to better engage female clients and address changing expectations around financial planning, portfolio construction and long-term wealth management. It also offers curated events with Brookfield investment professionals and industry experts, creating opportunities for deeper conversations around private markets, investor behavior and evolving client trends.

John Sweeney, CEO of Brookfield's private wealth business, said, "As the Great Wealth Transfer continues, women are taking on an even larger role in managing wealth. Through our Women & Wealth Initiative, we are committed to equipping advisors with the education and resources they need to engage women investors more effectively around alternatives. We look forward to continuing to partner with both female advisors and investors as the market evolves."

To further support advisors and their clients, The Alts Institute will release new global research next month focused on portfolio construction and implementation, offering timely insights into how advisors are positioning alternatives within client portfolios.

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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 infrastructure, energy, 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.brookfield.com.

Brookfield Private Wealth LLC is registered as a broker-dealer with the U.S. Securities & Exchange Commission ("SEC") and is a member of Financial Industry Regulatory Authority, Inc.) ("FINRA") and the Securities Investor Protection Corporation ("SIPC").

Advisors interested in learning more about Brookfield's private wealth solutions should call +1 (855) 777-8001 or email ir@brookfield.com.

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