

New Brookfield Research Shows Advisors Increasingly Moving Beyond Alternatives Education to Portfolio Implementation

Nearly one-third of advisors now report deep alternatives expertise, almost double 2024 levels

NEW YORK – June 25, 2026 – [Brookfield](#) today released new research from its Alts Institute highlighting how financial advisors are increasingly integrating alternatives into client portfolios. The study, which was conducted by independent research organization [CoreData](#), surveyed more than 600 financial advisors with an average practice AUM of US \$657 million and 60 gatekeepers in the U.S., Canada, the U.K. and Switzerland responsible for evaluating alternative asset managers and products for firm platforms regionally and globally. The findings signal a shift in the advisory landscape as alternatives become a more established component of portfolio construction and play a growing role in helping clients achieve their investment goals.

Compared to Brookfield’s inaugural 2024 survey, the newest findings indicate that advisors are demonstrating significantly greater expertise and adoption of alternatives. The number of advisors who report a deep knowledge of alternatives has nearly doubled to 32%, while the percentage of advisors identified as “Power Users” has grown to 40% globally from 26% in North America in 2024. These advisors, who scored highly on Brookfield’s alternatives index, demonstrating strong current alternatives usage deployed broadly across a variety of vehicles and products, are significantly more likely to have alternatives integrated into their portfolio management processes and to view them as an increasingly important component of high-net-worth investor portfolios. On average, Power Users allocate 22% of client portfolios to alternatives.

Key findings among advisors in the US and Canada:

Alternatives conversations are becoming more sophisticated

- 71% say client conversations have shifted from basic education to discussions focused on portfolio goals and the role alternatives play in achieving them.
- 73% say alternatives are now used as much for risk management as for return generation.

Alternatives adoption is driven by portfolio goals and risk management

- 82% say understanding client liquidity needs have helped them implement alternatives more effectively.
- 57% plan to increase their use of evergreen funds over the next two years.
- 68% say self-funding/reinvesting proceeds is the easiest way to expand clients’ alternatives allocations.

Education continues to drive adoption

- 66% say that educational materials have propelled their use of alternatives.
- 77% say alts expertise as a “must have” and 73% say it’s a meaningful growth driver for their practice.

- 72% say portfolio construction support is one of the most valuable resources an alternatives partner can provide

John Sweeney, CEO of Brookfield's private wealth business, said, "We are seeing a significant shift in how advisors approach alternatives. As familiarity with the asset class has grown, the conversation has evolved from understanding what alternatives are to understanding how they can be used within a portfolio to help achieve specific client objectives. That evolution is helping advisors build deeper expertise, integrate alternatives more thoughtfully into portfolios and ultimately deliver better outcomes for clients."

Brookfield's Alts Institute provides financial advisors with educational resources, asset allocation strategies, and best practices to unlock the opportunity of alternative investments. Learn more about the full global results [here](#).

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