

For Immediate Release

BROOKFIELD OAKTREE WEALTH SOLUTIONS EXPANDS PRIVATE WEALTH OFFERINGS THROUGH LAUNCH OF UCI PART II PLATFORM

Fund framework gives individual investors in EMEA, Asia, and Latin America greater access to alternative investment strategies from Brookfield and Oaktree

NEW YORK – April 29, 2024 – [Brookfield Oaktree Wealth Solutions](#), a leading provider of alternative investments to financial advisors and their clients globally, today announced the launch of its UCI Part II (SICAV) platform for wealth management clients. The Luxembourg-based, regulated fund framework gives investors across EMEA, Asia, and Latin America greater access to Brookfield and Oaktree strategies, and signifies Brookfield Oaktree Wealth Solutions' commitment to providing best-in-class alternative solutions to wealth investors across the globe.

The UCI Part II platform will feature Brookfield's perpetually offered infrastructure strategy which leverages Brookfield's \$293B infrastructure platform to invest in individual deals and assets across renewable power and transition, data, utilities, transport, and midstream. Brookfield Oaktree Wealth Solutions plans to add additional strategies including Oaktree credit strategies to the platform in the coming quarters.

John Sweeney, Brookfield Oaktree Wealth Solutions CEO, said, "As we continue to grow Brookfield Oaktree Wealth Solutions capabilities globally, the UCI Part II launch marks an exciting milestone in our product innovation efforts. We look forward to continuing to evolve and add to the number of perpetually offered and private funds for advisors and their clients."

Tara Newbery, Brookfield Oaktree Wealth Solutions' Managing Director and Head of Legal EMEA and APAC, added, "UCI Part II funds are an ideal wrapper for wealth investors looking to access alternative investment strategies such as those offered by Brookfield and Oaktree. The registered nature and low investment minimum of a UCI Part II allows for greater scale across key markets, but also provides greater familiarity for clients. Our UCI Part II Platform aims to simplify due diligence and onboarding processes for our distribution partners enabling our wealth partners to onboard new products efficiently."

Brookfield Oaktree Wealth Solutions was launched in April 2021 with the goal of expanding alternative investments to financial advisors and their clients, globally. The provider now offers a variety of liquid, semi-liquid, and private strategies across real estate, infrastructure, credit, and private equity, with 150 employees across 10 countries. Managing more than \$900 billion in assets as of Feb. 7, 2024, Brookfield and Oaktree together comprise one of the largest alternative asset managers in the world.

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About Brookfield Asset Management

Brookfield Asset Management Ltd. (NYSE: BAM, TSX: BAM) is a leading global alternative asset manager with over \$900 billion of assets under management across renewable power and transition, infrastructure, 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 <https://bam.brookfield.com>.

About Brookfield Oaktree Wealth Solutions

Brookfield Oaktree Wealth Solutions is a leading provider of alternative investments to advisors and their clients globally, helping them meet their overall financial goals. The global scale and multi-decade track records of our parent companies, Brookfield and Oaktree, place us among the leaders in alternative investing. For more information, please visit our website at www.brookfieldoaktree.com. Brookfield Oaktree Wealth Solutions 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 Oaktree Wealth Solutions should call +65 6750 4522 or email info@brookfieldoaktree.com.

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