The Alts Opportunity for Investors and Advisors

Room for growth: Alts users want to invest more in alternatives

of alts users agree that they are open to investing

88%

more in alternatives

of alts users would like to invest in a greater variety

78%

of investments beyond what they currently own

of alts users plan to increase their alts allocation over the next one to two years

62%

investors are prioritizing alts investing non-users are open to investing in alternatives and want to learn more 1 in 2 about alternatives. Nearly half of

All in on alts: High-net-worth



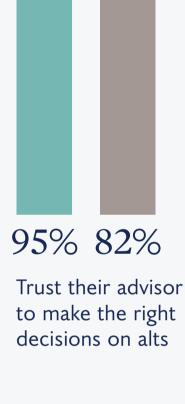
likely to begin investing in alts within the next year. of all investors have either switched or considered switching advisors to access better quality alternatives.

non-users are at least somewhat

Alts Users Non-Users

looking to advisors to lead the way

Expertise wanted: Investors are







if their advisors recommended it don't know the right questions to ask about alternatives

Cracking the alts code: Perceptions

VS.

don't always match reality

Perception

of advisors point to

53%

said they would begin investing in alternatives

Reality

81%

of HNWI say short-term

Non-users also seek guidance:

for alts expertise

Many are looking to their advisors

concerns about liquidity cash needs are unlikely constraints as a challenge to increasing allocations

to using alts is the fees are too expensive 37% of advisors say a reason

HNWI are not more open

to using alts is they are

too risky

of advisors say a reason

HNWI are not more open

86% of non-users agree that they are willing to ride

out an investment's

the longer term

volatility to achieve their

investment goals over

of alts users agree that

the fees

the outcomes are worth

Alts Champion, Emerging Adopter, or Traditionalist? Discover 3 key high-net-worth investor profiles and strategies for starting

insightful conversations about alternatives.

Survey Methodology: Brookfield Oaktree Wealth Solutions commissioned CoreData Research to conduct separate online surveys of 300 financial professionals with an average practice AUM of \$633 million in the U.S. and Canada and 625 high-net-worth investors with at least \$2.5 million in household investable assets

in the U.S., Canada, Hong Kong, Singapore and Taiwan between April and June 2024.

©2024 Brookfield Oaktree Wealth Solutions LLC is a wholly owned subsidiary of Brookfield. Brookfield Oaktree Wealth Solutions LLC is registered as a broker-dealer with the U.S. Securities and Exchange Commission (SEC) and is a member of FINRA and the Securities Investor Protection Corporation (SIPC).

The information contained herein is for educational and informational purposes only and is not intended as and may not be relied on in any manner as legal, tax or investment advice, a recommendation, or as an offer to sell, or a solicitation of an offer to buy any securities offered by Brookfield Corporation and its affiliates (together, "Brookfield"). Information and views are subject to change without notice. Brookfield may not have verified (and disclaims any obligation to verify) the accuracy or completeness of any information included herein, including information that has been provided by third parties, and you cannot rely on Brookfield as having verified any of the information. Any outlooks or forecasts presented herein are as of the date appearing on this material only and are also subject to change without notice.

ID B-620922