Alternative Investments Are Becoming a Core Portfolio Strategy for Canadian Investors, According to Nour Private Wealth

Institutional investing increasingly shapes private wealth management, with alternative assets becoming a key feature of sophisticated portfolio construction.

Alternative Investments Are Becoming a Core Portfolio Strategy for Canadian Investors

TORONTO, ON, CANADA, July 16, 2026 /EINPresswire.com/ -- A fundamental shift is underway in how the wealthiest families construct their portfolios. Alternative assets, including private equity, private credit, real estate, infrastructure, and venture capital, are no longer treated as supplementary exposures. Alternative assets, including private equity, private credit, real estate, infrastructure, and venture capital, are no longer treated as supplementary exposures.

For UHNW investors, they are increasingly a core allocation, central to achieving the diversification, stability, and long-term returns that traditional public markets alone cannot reliably deliver.

This transition has been shaped, in part, by watching institutional investors operate. Pension funds and sovereign wealth funds have maintained high alternative weightings, often 50 percent or more of total assets, for many years. The performance case has been consistent, and the [best private wealth advisors] are applying the same logic to family portfolios.

The data reflects this evolution. A Bank of America family office study found that offices globally devote approximately 35 percent of capital to alternative strategies. North American family offices now target roughly 29 percent in private markets, according to Preqin data.

Canadian offices have moved more cautiously, with 83 percent holding less than 40 percent in alternatives. Real estate represents the largest category, followed by private equity and private credit, but allocations are rising steadily.

"The evolution of wealth management reflects a broader shift in how institutional investors view capital. Wealth is no longer simply something to preserve; it is a responsibility to steward with discipline, purpose, and a long-term perspective. Alternative investments have become an important expression of that philosophy."
— Elie Nour, Founder & CEO, Nour Private Wealth

For families exploring tax strategies for high net worth individuals, private market investments offer additional advantages. Longer hold periods create opportunities for tax deferral, and certain structures, including limited partnerships and family trust arrangements, can be used to manage income recognition and capital gains exposure across generations.

NPW has built the infrastructure to serve this growing demand. The acquisition of Goodwood brought nearly 30 years of alternative investment experience into the firm's platform, enabling NPW to structure portfolios across public funds, private funds, co-investments, and direct deals. Critically, all of this is managed within a disciplined governance framework covering due diligence, liquidity management, compliance review, and ongoing monitoring.

As RBC Global Asset Management has noted, the long-term perspective that private markets require is well suited to multigenerational wealth planning. Investments in infrastructure, real estate, and private businesses can compound value over time in ways that align naturally with legacy financial planning objectives.

- Canadian UHNW families are increasingly targeting 25 to 40 percent of portfolio value in alternative assets.
- Real estate leads alternative allocations among Canadian family offices, followed by private equity and private credit.
- Goodwood's integration into NPW's platform provides clients with access to institutional-quality alternative strategies and oversight.
- Rigorous liquidity management and manager selection remain the primary risk considerations when increasing private market exposure.

Alternative investments are no longer a niche consideration for the top wealth management firms serving Canadian families. They are a standard component of sophisticated portfolio construction. The question is no longer whether to include them. It is how to manage them with the discipline and governance that UHNW families deserve.

About Nour Private Wealth
Nour Private Wealth (NPW) is a trade name of Nour Private Wealth Inc., a member of the Canadian Investment Regulatory Organization (CIRO) and the Canadian Investor Protection Fund (CIPF). We provide private wealth management services, including multi-family office solutions, discretionary portfolio management, governance coordination, and integrated planning across public and private markets.

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