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**STEWARD:**  
 DIVAM MEHTA '01

Divam Mehta '01's interest in a finance career began in Steward's Upper School with teacher **Steve Kautz**. He's had a prolific career since graduation, and last summer he and Kautz teamed up to share their joint knowledge at the Maine Jump\$tart Coalition's Fostering Financial Education in Maine Schools Conference. Beginning his career as a research analyst and serving as a portfolio manager for a wealth management and investment advisory firm, Mr. Mehta launched Mehta Financial Group, LLC in 2010 in order to guide individuals and families along their financial journey by designing dynamic, actionable, and organic financial plans.

## Former Student and Teacher Team Up at Financial Conference

Since founding Mehta Financial Group, LLC, InvestmentNews has recognized Mr. Mehta as a "Top 40 Under 40" Financial Advisor and awarded him a Rising Star Award. In addition, he has been featured on the cover of Proactive Advisor Magazine and featured by several local and national publications such as CNBC, USA Today, CBS MarketWatch, Yahoo Finance, and The Richmond Times-Dispatch. Mr. Mehta is also the recipient of the Financial Planning Association's Diversity Scholar Award for serving diverse communities and has been honored with the Young Alumni Achievement Award from Florida State University.

*What was it like presenting at the Fostering Financial Education in Maine Schools Conference?*

I had a fantastic experience. I was a guest speaker for two sessions: "Socially Responsible Investing" and "The Basics of the Stock Market." Mr. Steve Kautz, my former economics teacher from Steward 18 years ago, invited me to be a part of this great event. Mr. Kautz, along with being a consultant for Jumpstart and former Educator of the Year in Maine, is responsible for recruiting speakers across the country to be a part of the event. Being the tenth anniversary for the conference, he suggested that it would be a great experience for all attendees that a former student would be a guest speaker. It was an empowering and inspirational moment for the educators who were in attendance as they could visualize that they are absolutely having a positive impact in their students' lives.

*How did you get into the area of personal finance, and what draws you to the field?*

I believe that everyone deserves an opportunity to control their own financial destiny instead of relying on happenstance. Often, however, they

lack the specific skillset to create a disciplined plan to achieve their financial goals with confidence. Being a first-generation immigrant from India, I have seen the hardships that the lack of financial guidance can cause. My family and I moved to the United States when I was very young. Upon arriving to an unknown land, my family and I faced countless obstacles: cultural assimilation, language, and financial illiteracy. Without proper financial guidance, many immigrant families' aspirations often descend into chaos since they have close to zero assets and aren't familiar with the United States' financial structure. Experiencing this within my own community, I chose to become a financial planner in an attempt to help my community members understand and benefit from the U.S. tax structure, investment landscape, and available financial solutions.

*What was the inspiration behind the session "The Stock Market for Teachers and Their Students"?*

Mr. Kautz suggested it. We both thought it would be a wonderful opportunity to do a joint session—a former teacher and student together! The session sought to provide a blueprint for educators of why teaching the basics of the stock market is important to students, as well as how to do it. I had my first exposure to the market in my economics class taught by Mr. Kautz. Along with learning about fundamental macro and micro economic analysis, Mr. Kautz also incorporated the Stock Market Game in order to provide students a glimpse into the investment landscape. During the session, we discussed why learning about the market is important, some basic investing strategies, and the long-term outlook on how it provides students the confidence to make informed financial decisions in the future.