

# Mihir Mehan, CAIA

Impact Investing

New York City, NY, United States | [LinkedIn](#)

Mihir is the Associate Director, Investments at Veris Wealth Partners, an impact wealth manager with an AuM of \$2B. He is responsible for investment manager due diligence, thematic research, and pipeline development. While obtaining his MBA, he was a Principal of Sustainable Investment Fund, a \$4.5M student-run fund investing in public markets with an ESG lens, and a Founding Venture Partner for Haas Impact Fund, a student-run impact investing fund focused on early-stage impact-oriented startups. He also interned with Connectivity Capital, deploying high-impact debt to fund infrastructure development improving internet access and affordability in frontier markets.

Prior to his MBA, he spent three years at Tata Trusts, one of India's largest philanthropic organizations, where he worked on the intersection of technology and women empowerment helping bridge the online gender divide in rural India.

Previously, he worked in the investment banking division for J.P. Morgan advising financial institutions in Southeast Asia for two years.

Mihir graduated from the Birla Institute of Technology and Sciences with a BE (Honors) in Mechanical Engineering. He received his MBA from UC Berkeley Haas School of Business, where he served as co-president of the International Development and Enterprise Club and a student advisory board member at the Center for Equity, Gender, and Leadership (EGAL).

He is passionate about leveraging the power of impact investing to unlock and channelize capital for inclusive business models creating a tangible impact on the world.

The opinions expressed herein reflect my own opinions and do not reflect the views of my employer, Veris Wealth Partners, LLC.

## EXPERIENCE

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### Associate Director, Investments

Jul 2023 — Jul 2025

Veris Wealth Partners

*New York City Metropolitan Area*

Veris is an investment advisory firm that applies sustainable and impact investing expertise across public and private markets to help families and mission-driven organizations meet their financial objectives & goals for social and environmental impact.

A majority-women-led wealth management firm and OCIO for endowments and foundations, Veris has been helping investors align their financial assets with their values and vision for the future since 2007.

### Investment Associate

Jan 2022 — Jun 2023

Veris Wealth Partners

*New York City Metropolitan Area*

Veris is a pioneer in impact investing and enables clients to achieve both financial goals and impact objectives. The firm provides investment solutions across four themes - climate solutions and the environment, racial and gender equity, community wealth building, and sustainable and regenerative agriculture.

### Impact Investment Research Intern

Oct 2021 — Dec 2021

Veris Wealth Partners, LLC

*San Francisco Bay Area*

Veris is a pioneer in impact investing and enables clients to achieve both financial goals and impact objectives. The firm provides investment solutions across four themes - climate solutions and the environment, racial and gender equity, community wealth building, and sustainable and regenerative agriculture.

### Principal, Sustainable Investment Fund

Aug 2020 — May 2021

University of California, Berkeley, Haas School of Business

*Berkeley, California, United States*

The Haas Sustainable Investment Fund launched in 2008, is the first and largest student-led sustainable investment fund at a leading business school with a current AuM of US\$4.6M.

Actively source investment opportunities through the ESG lens across asset classes - equity, fixed income, and real assets.

Exposure to passive investment strategies via Aperio's investment platform.

### Summer Impact Associate

May 2020 — Sep 2020

Connectivity Capital

*San Francisco Bay Area*

World's first impact investment fund focused on expanding internet access in frontier markets

Created the fund financial model, impact measurement framework, and key fundraising materials leading to successful investments from USAID and Facebook Connectivity into Connect the World Fund -1

Built the investment pipeline in South-East Asia and Sub-Saharan Africa by creating a multi-factor country attractiveness scale and performing comprehensive bottom-up analysis of internet service providers

Developed an open-source business toolkit covering sales training, marketing strategies, and pricing modules aimed to reduce the barriers to successful operations of internet service providers in emerging markets

### Founding Venture Partner

Jan 2020 — May 2020

Haas Impact Fund

*Berkeley, California, United States*

The Haas Impact Fund invests in exciting early-stage impact-oriented startups across diverse impact areas. Partners are focused on sourcing, diligence, and portfolio stewardship of early-stage social enterprises.

My team covered the workforce and financial inclusion sectors - in April 2020, we pitched our recommendations to a panel

of judges and were fortunate to have won the inaugural Invest for Impact Pitch Competition. This secured our pitched startup a \$50,000 equity investment from the Haas Impact Fund.

### **Consultant, Operations and Strategy**

Apr 2018 — May 2019

FREND

*Gurgaon, India*

Part of the core team at FREND, a foundation created as a follow on for the Internet Saathi initiative, supported by Tata Trusts and Google India

Responsible for managing operations in key geographies and developing technological solutions and strategies to optimize program implementation pan-India

Led effort to identify and onboard 12 non-profits, developing strategies to create a reliable network and expand village coverage in additional 150,000+ villages through existing and new partners in order to reach the overall target of 300,000 villages pan-India

Created a 3-year funding proposal, outlining the governance structure, implementation plan, and intended outcomes and prepared a detailed budgetary framework focused on project sustainability, securing funding of \$14M USD from Tata Trusts and Google

Developing technological interventions aligned with UN Sustainable Development Goals to create livelihood opportunities for 50,000+ women volunteers; currently, secured \$4M USD of digital livelihood opportunities from UNICEF and NITI

Aayog, a policy think tank of Government of India

### **Consultant, Operations**

Apr 2016 — Mar 2018

Tata Trusts

*Mumbai Area, India*

Spearheaded the scaling of the Internet Saathi initiative, an effort to tackle the gender digital divide in rural India, from 800+ villages in 6 states to 140,000+ villages in 14 states, benefitting 14 million women by managing 5 clusters managers, 23 non-profits, 1,000+ dedicated field staff, and 40,000+ women volunteers.

Directed the development of a mobile app to record data collected by volunteers and track the progress and impact of the program via a real-time web interactive dashboard by visualizing key monitoring metrics based on over 300 million data points

Built entrepreneurial models for women volunteers to provide digitally enabled services to the community by identifying need gaps in the community; completed successful pilots based on portable printers (Hewlett Packard) and data collection (Nielsen)

Rated Outstanding for two consecutive years; featured as a Champion of Hope on Tata Trusts' social media channels as a part of a series profiling select program managers driving positive impact through initiatives at Tata Trusts

### **Investment Banking Analyst**

Jun 2014 — Mar 2016

J.P. Morgan

*Mumbai Area, India*

Part of a six-member team covering financial institutions such as banks, insurance companies, and wealth management firms across the Asia-Pacific region. Created pitch books, commitment committee memos, request for proposal (RFP) responses, and investor presentations involving financial modeling, M&A scenario analysis, capital structure analysis, investment highlights, and industry landscaping

Collaborated on the end-to-end in the execution of a \$1.2B USD life bancassurance 15-year partnership between Manulife and DBS, covering four markets; the transaction was the largest life bancassurance transaction in Asia since 2013 and the largest M&A deal for Manulife

Prepared the roadshow presentation for the successfully completed \$750M USD rights offering by Metrobank, resulting in Metrobank complying with strict Basel 3 standards and maintaining a high growth rate in the competitive Philippine banking sector

Runners-up in J.P. Morgan Deal Incubator, an in-house idea generation competition for potential transactions; presented cross-geography merger & acquisition opportunities created through cross-holding unwind in Japanese companies

Appraised highest performance rating for two consecutive years; 2-month secondment in the Singapore office

### **Trainee Design Engineer**

Jul 2013 — Dec 2013

Robert Bosch GmbH

*Bengaluru Area, India*

Performed exhaustive patent analysis, functional and morphological analysis for concept generation & selection, detailed design calculations and created Pro-E model for Roots supercharger

Gained a thorough understanding of the entire research and development process beginning from the pre-development stage to the series production stage done in a typical German environment

### **Summer Trainee**

May 2012 — Jul 2012

Honda Motorcycle & Scooter India Pvt. Ltd.

*Manesar*

Gained a complete insight of two-wheeler industry by working in all the four major departments - Production Body, Production Power Train, Production Planning & Control and Production Support

Understood the Japanese philosophy of 5S and 3G and implemented Pareto analysis & 5W1H successfully

## **EDUCATION**

### **University of California, Berkeley, Haas School of Business**

Jan 2019 — Jan 2021

*Master of Business Administration - MBA*

- Principal – Sustainable Investment Fund – \$4.6M student-run fund investing in public markets with an ESG lens

- Open Innovation Fellow – Dell Giving – crafting a data-driven framework for its 2030 Social Impact strategy

- Student Advisory Board – Center for Equity, Gender, and Leadership; organizing the Investment in Inclusion Pitch Competition, helping provide capital to enterprises tackling the issues of exclusion and marginalization
- Co-President – International Development and Enterprise Club; VP Careers – Net Impact Club
- Awarded Berkeley Haas Defining Leader scholarship; Featured by Poets & Quants in MBA Class of 2021 article

**Birla Institute of Technology and Science, Pilani**

Jan 2010 — Jan 2014

*Bachelor of Engineering - BE (Honors) in Mechanical Engineering*

Activities and societies: Wall Street Club

**St Anselm's Pink City school**

Jan 1995 — Jan 2009

## CERTIFICATIONS

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**Climate Finance**, CFA Institute

Nov 2024

## SKILLS

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Quantitative Analysis (Finance) · Private Investment · Investment Portfolios · Investment Performance · Investment Research · Investment Strategies · Community Investment · Portfolio Management · Written Communication · Capital Markets · Valuation · Impact Investing · Equities · Oral Communication · Skilled Multi-tasker · Attention to Detail · Investment Decisions · Presentations · Microsoft Office · Microsoft Excel · PowerPoint · Operations Management · Nonprofit Organizations · Sustainable Development · Financial Analysis · Investment Banking · Creative Problem Solving · Non-profit Program Development · Planning Budgeting & Forecasting · Microsoft Word · Emerging Markets · Business Relationship Management · Relationship Building · Presentation Skills · Teamwork · Strategy · Project Management · Fundraising · International Development · Research · Leadership · Pitch Books · Data Collection · Financial Markets · Finance · Investments · Social Impact · Business Strategy · Sustainable Investing · Due Diligence