

Orange

APPEAL



Happy Holidays!

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A native of Orlando, and fourth generation Floridian, Katie Miller Witter is Principal and Wealth Advisor of Financial Harvest Wealth Advisors in Winter Park. Katie and her husband, David, are wealth strategists with over 40 years of combined experience, who have co-owned the Registered Investment Advisory firm together since 2009. Katie also leads business development and client event initiatives for the firm, managing over \$350 million in assets for clients.

The powerful partnership enables Katie and David to develop superior wealth management solutions for individuals, families, and businesses throughout Florida, across the United States, and internationally. The 'dream team,' as Katie refers to her teammates, provide customized, fee-based financial planning and wealth advisory services, and produce strategic partnerships with other professionals to help clients with preserving their wealth, mitigating taxes, transferring wealth to loved ones efficiently, protecting assets, and maximizing charitable giving impact.

The duo both entered the Financial Planning industry in 2002, but didn't meet until 2008. And it wasn't long after their first jog together that they fell in love. When they were engaged to be married, they sketched out their life dreams, one of which was building a wealth management firm together as a husband and wife team. Yes, partners in life AND in business. Katie's roots run deep in the community. She serves on

numerous Boards, including the Winter Park YMCA, Metro YMCA, Fellowship of Christian Athletes, and is a Lifework Leadership Alumni and Coach. Katie also serves in a variety of ways at her Church, First Presbyterian Church of Orlando, as a ruling Elder, Co-Leader for Marriage and Family Ministry, and on several vision teams. Previously, she has been active with The Cummer School of Business (Rollins College) Alumni Board helping alumni connect to serve the Central Florida community.

Katie cherishes time spent with her family more than anything, whether it's a bike ride, boat ride, round of golf, or travel. She loves cheering for their son, Will, on the golf course, football field, or basketball court, and for their daughter, Kate, at Stone Dance Academy and dance competitions!

Education

Rollins College, Crummer Graduate School of Business, Winter Park, Florida,

MBA Finance, 2002

University of Florida, Gainesville, Florida,
B.S. Finance and Marketing, 1998

"Working with your spouse provides the added benefit of having your biggest fan by your side every day," Katie said. "This becomes especially important when navigating difficult seasons in business, but is also made sweeter when you get to celebrate a success. It's exciting in any business to have something to celebrate, but it's even greater to enjoy it with your significant other."

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Melissa D'Orazio, CFP®, is a Private Banker with United Community Bank, formerly Seaside Bank and Trust, where she has worked for over a decade helping clients navigate the various nuances of their financial needs. She began her Private Banking career in Orlando nearly 30 years ago after falling in love with the city while in graduate school. She has worked with a variety of clients, including executives, business owners, and retirees, helping them achieve and maintain the financial lifestyle they all desire. She feels that her clients are more like friends and family rather than a typical client and can log decades working with so many of them.

Melissa, a second-generation Floridian, was raised in the small town of Palatka before attending the University of Florida for her undergraduate degree in Finance. She then came to Orlando to attend the University of Central Florida for her master's and loved the "small town in a big city" atmosphere so much that she never left.

In her position at United Community, she can provide not only Wealth Management and Financial Planning services but also traditional banking services such as consumer and commercial lending as well as treasury

and cash management. It is this ability to spearhead all needs for her clients, both individually and for their businesses, that allows her to truly be a trusted financial advisor. She prefers to come to an initial meeting with simply a pad of paper and just LISTEN - this is the best way to understand what a client really wants.

Melissa also has enjoyed many volunteer opportunities in the area, including one-on-one mentoring with the Children's Home Society. Melissa was adopted as an infant through CHS and wanted to give back to the organization that provided the amazing childhood she experienced. She then found her passion as a member of the Central Florida Women's League where she works to raise funds that are provided to local home-grown charities and scholarships for young girls headed to college. In the CFWL, she has served on the board for nine of her 12 years in the organization, as treasurer, president and numerous other board positions. She has also been a recipient of the United Community Chairman's Circle Award, the highest honor at the Bank, each year since she has been part of the United Community family. Melissa and her husband, Dan, live in Bay Hill with their pup, Harley.