How to Sign Your Proposal in Ignition

Welcome to Lomness CPA! We are excited to partner with you in your tax and accounting journey. To make your onboarding seamless, this guide will walk you step-by-step through signing your proposal using our secure proposal platform, Ignition.

🚀 Getting Started

- You will receive an email from Ignition.
- We recommend completing these steps on a computer for the best experience.

1. Open Your Proposal

    - Click the **Review & Sign** button in your email.

🗂️ Understanding Your Proposal

The proposal is divided into six clear sections:

Section	What You'll Find
1. Introduction	Welcome letter & FAQ
2. Services	Summary and description of included services
3. Pricing	Fee structure & billing schedule
4. Payment	Where you securely enter payment details
5. Sign	Review and accept Terms & Conditions Electronically sign the proposal
6. Next Steps	What to expect and how to reach us for help

Entering Payment Details

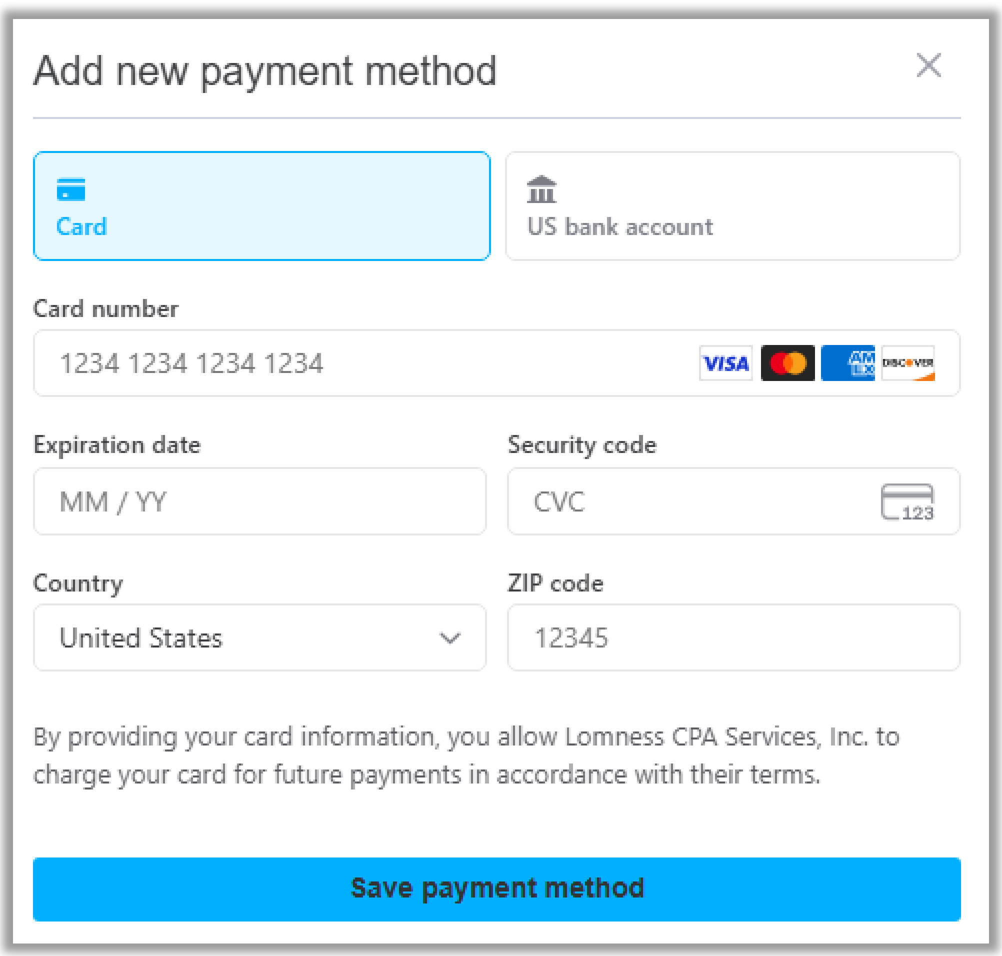
The payment process is easy and painless. Simply click **Add a new payment method**, then select **Card** or **US bank account**.

<u>For Credit/Debit Card Payments:</u>

For credit or debit cards, please follow the prompts to enter the following information:

- Card number
- Expiration date
- Security code
- Zip code

Make sure to click Save payment method. Please see the image below for reference:

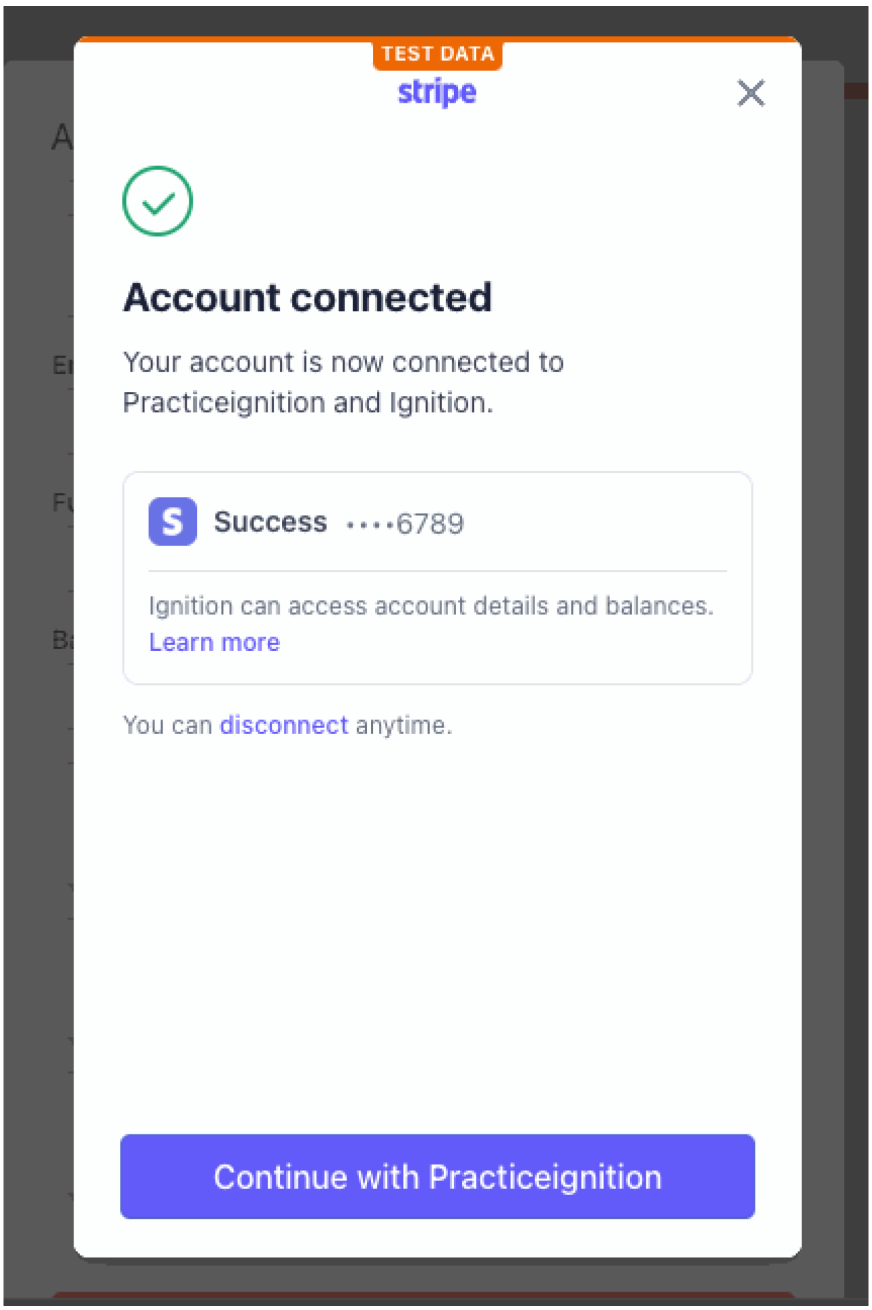


For ACH/Bank Payments:

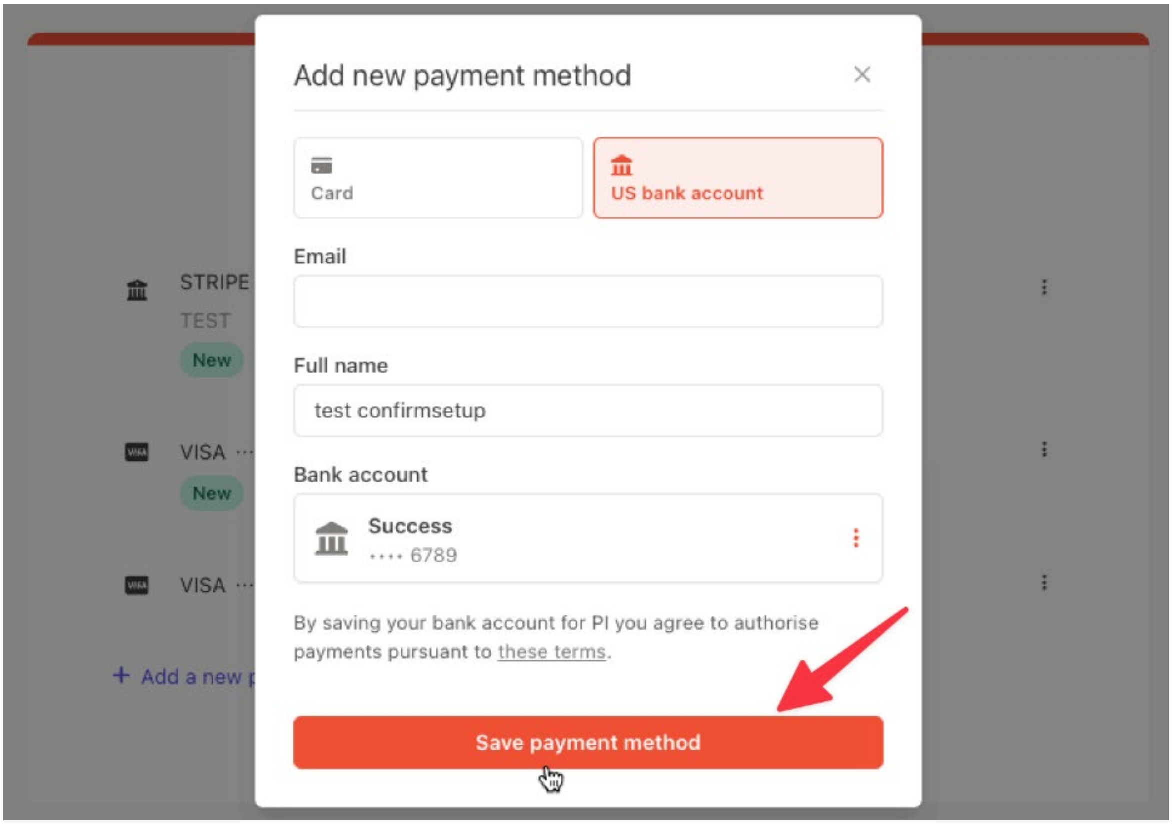
Your bank account will be securely verified by Ignition. You have two options:

Method 1: Instant Online Verification

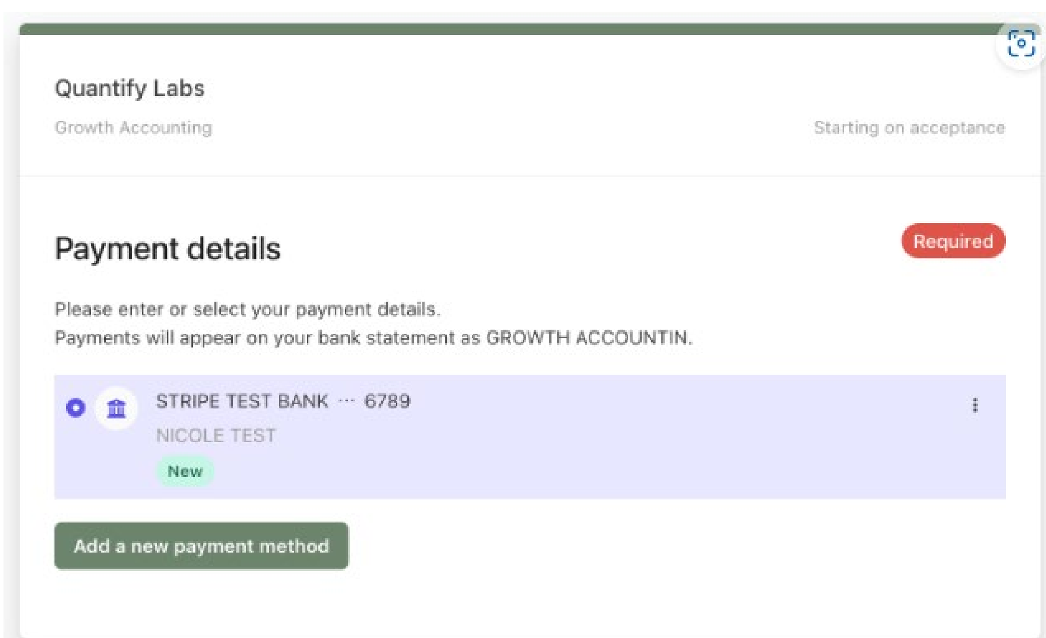
1. Log in to your online banking when prompted.
2. Select your preferred bank account.
3. Click **Continue with Practiceignition** (see image below for reference)



4. Click **Save payment method** (***don't skip this!***).



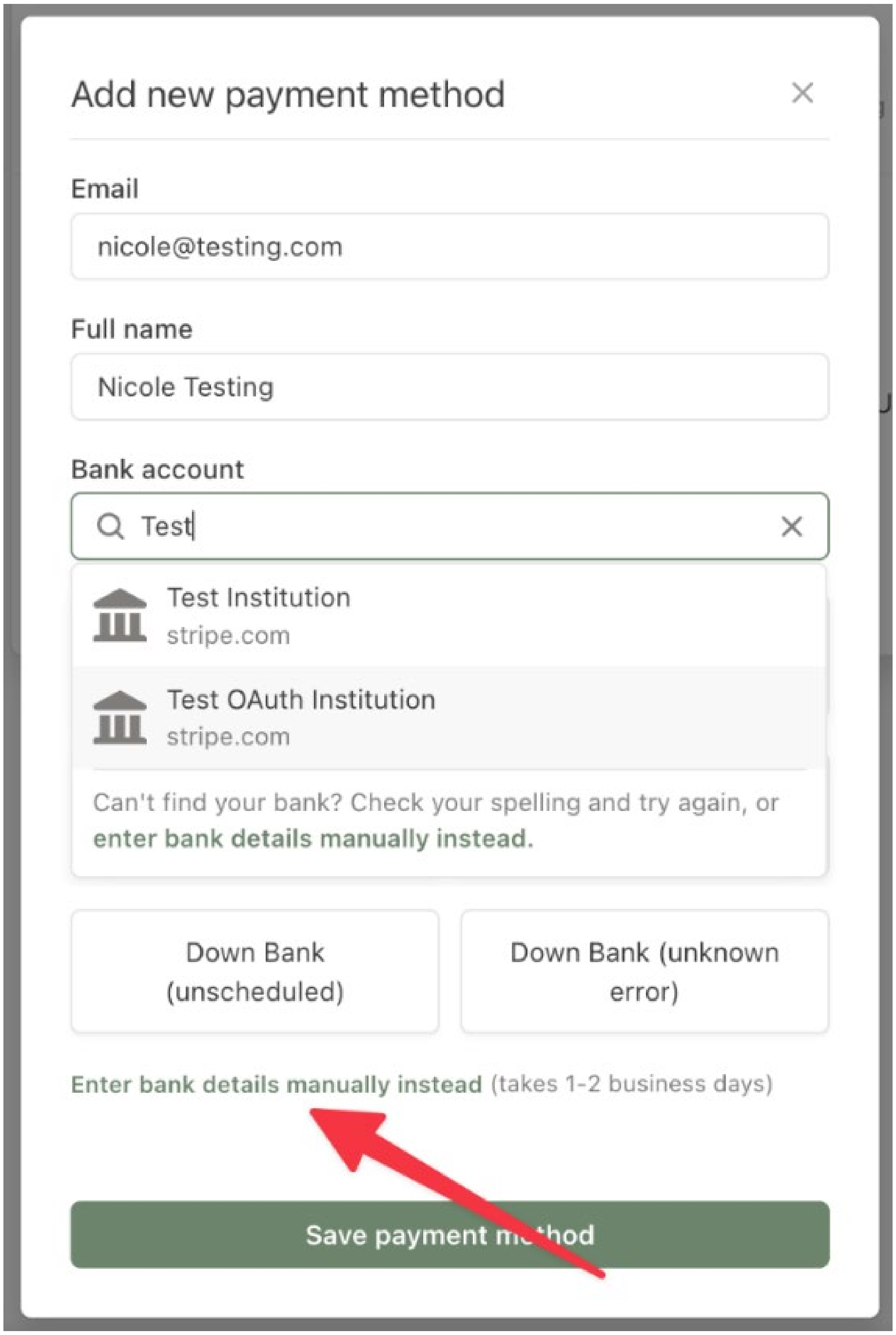
5. Your account is instantly verified, and you will be redirected back to the acceptance page of the proposal, which now displays and selects your bank account as your payment method.



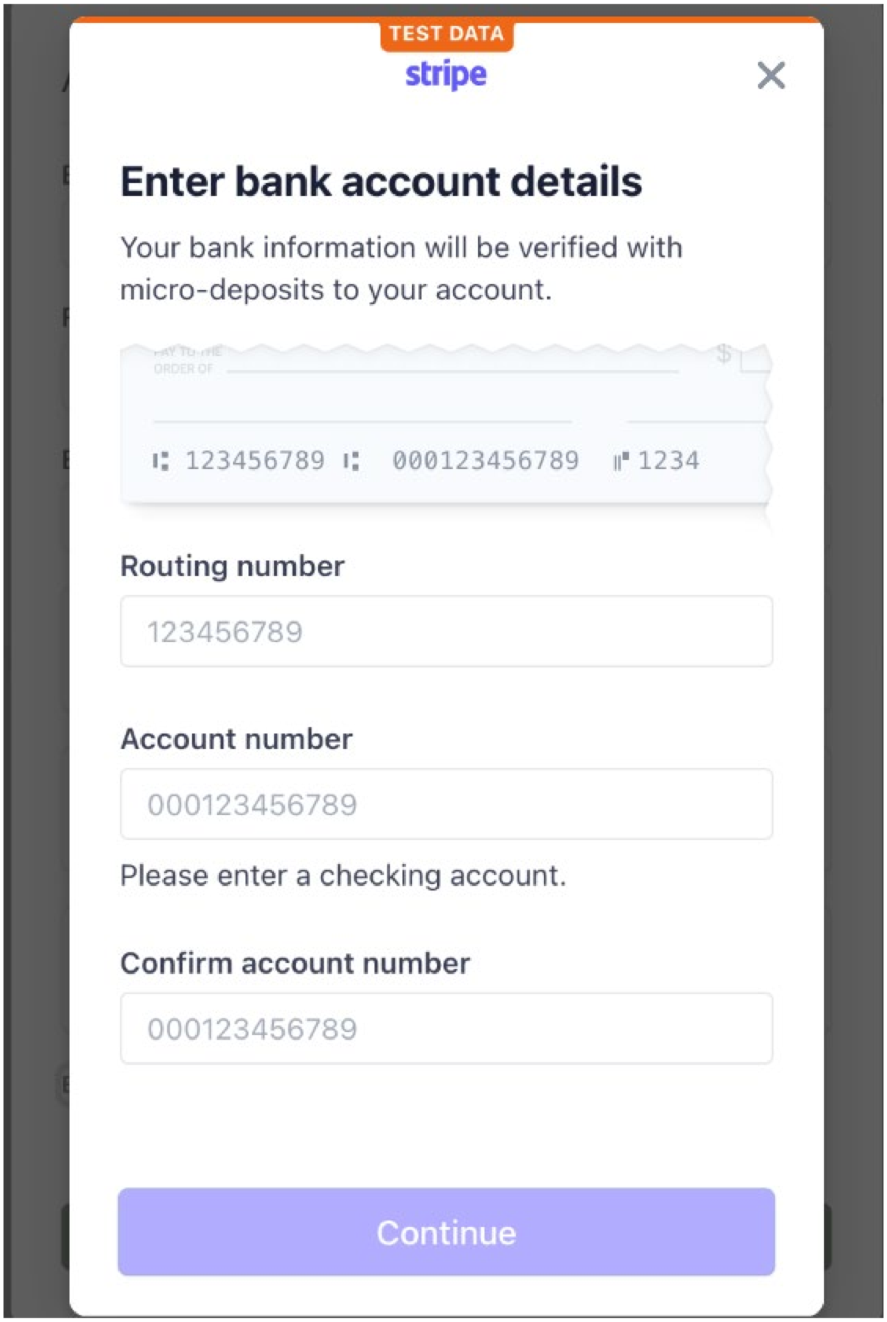
Method 2: Manual Verification (Micro-Deposits)

**Allow 1–2 business days for this method.*

1. Click **Enter bank details manually instead**.



2. Enter and confirm your routing and account numbers.



3. Follow the prompts to continue reviewing and signing your proposal.
4. Within **2 business days**, look for either:
    - Two small deposits labeled "ACCTVERIFY", OR
    - One deposit with a six-digit descriptor code.
5. At that time, you'll receive an email from Ignition with instructions and a link.
6. Enter the code or deposit amounts to complete verification.

Tip: The verification process only needs to be completed once, unless your bank information changes.

✍️ Signing the Proposal

1. Review **Terms & Conditions**: Scroll through to read your responsibilities and ours.
2. Download a Copy (Optional): Click **View PDF** to download or print.
3. Confirm: Check the box to confirm you've reviewed our terms.
4. E-Sign: Enter your signature electronically.

📝 Next Steps

- Find instructions about your next actions and what to expect from us.
- For tax clients: Important information about extensions, estimated taxes, and tax organizers is included.
- Need help? Contact us anytime—details are in this section!

Need Assistance?

If you have any questions or need support at any point, please reach out to our Operations team.
We're here to make your experience smooth and stress-free!

Info@LomnessCPA.com **|** (281) 962-0310