



LOMNESS CPA  
TAX & ACCOUNTING SERVICES



# 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**.


### For Credit/Debit Card Payments:


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:





Add new payment method

  
Card

  
US bank account

Card number

1234 1234 1234 1234




Expiration date

MM / YY

Security code

CVC

  
123

Country

United States

▼

ZIP code

12345

By providing your card information, you allow Lomness CPA Services, Inc. to charge your card for future payments in accordance with their terms.

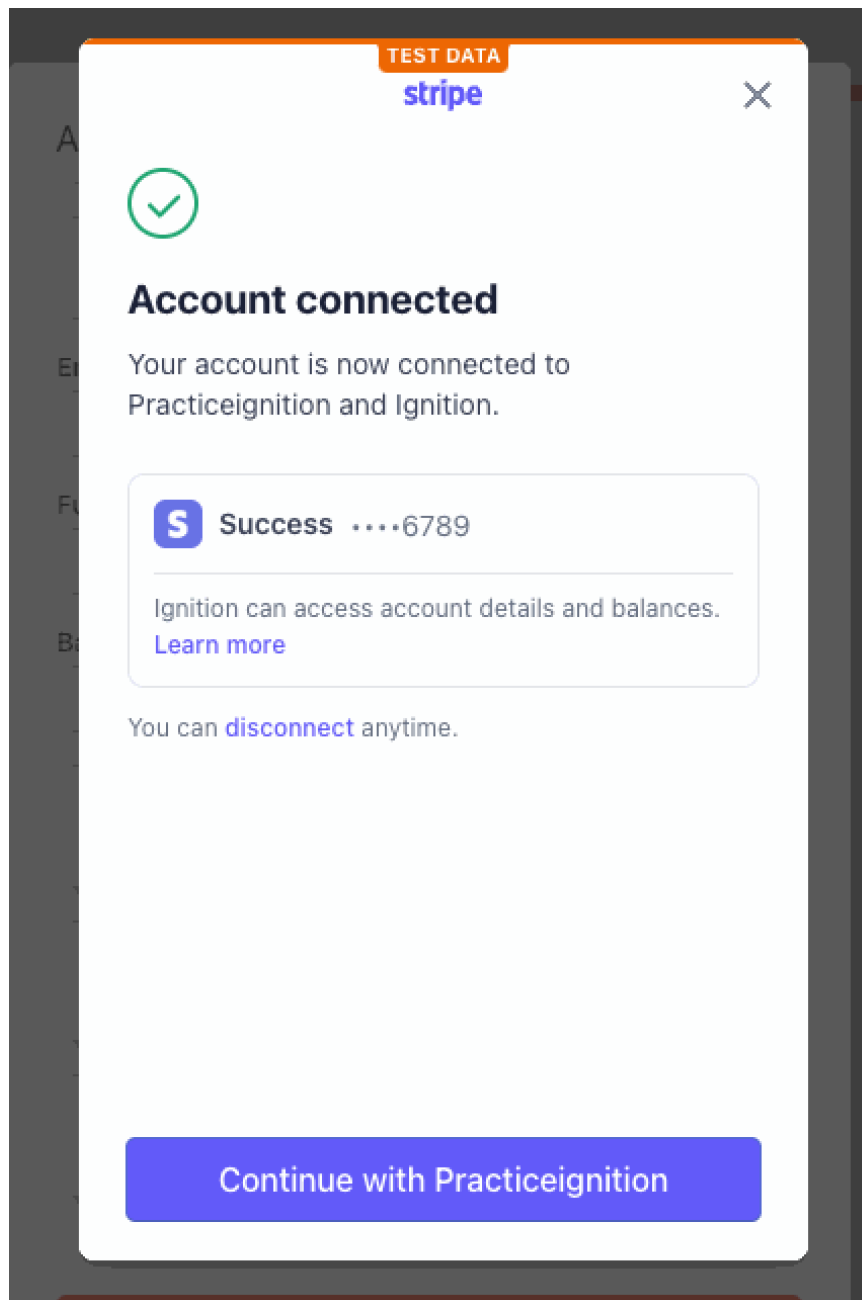
Save payment method

## **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!***).

The screenshot shows a modal titled "Add new payment method" with a close button (X) in the top right corner. Inside the modal, there are two radio buttons for selecting a payment method: "Card" and "US bank account". The "US bank account" option is selected and highlighted with a red border. Below the radio buttons, there are input fields for "Email", "Full name" (containing "test confirmsetup"), and "Bank account". The "Bank account" field shows a success message with a bank icon, the word "Success", and the account number "\*\*\*\* 6789". Below these fields, there is a line of text: "By saving your bank account for PI you agree to authorise payments pursuant to [these terms](#)." At the bottom of the modal is a large red button labeled "Save payment method". A red arrow points to this button, and a mouse cursor is hovering over it.

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.

The screenshot shows the "Payment details" section of a page for "Quantify Labs" (Growth Accounting). The page has a header with the company name and a "Starting on acceptance" status. The "Payment details" section has a "Required" label in a red box. Below the title, there is a message: "Please enter or select your payment details. Payments will appear on your bank statement as GROWTH ACCOUNTIN." Below this message is a list of payment methods. The first method is "STRIPE TEST BANK ... 6789" with the name "NICOLE TEST" and a "New" status. Below the list is a button labeled "Add a new payment method".

## Method 2: Manual Verification (Micro-Deposits)

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

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

Add new payment method

Email

nicole@testing.com

Full name

Nicole Testing

Bank account

Test

Test Institution

stripe.com

Test OAuth Institution

stripe.com

Can't find your bank? Check your spelling and try again, or **enter bank details manually instead**.

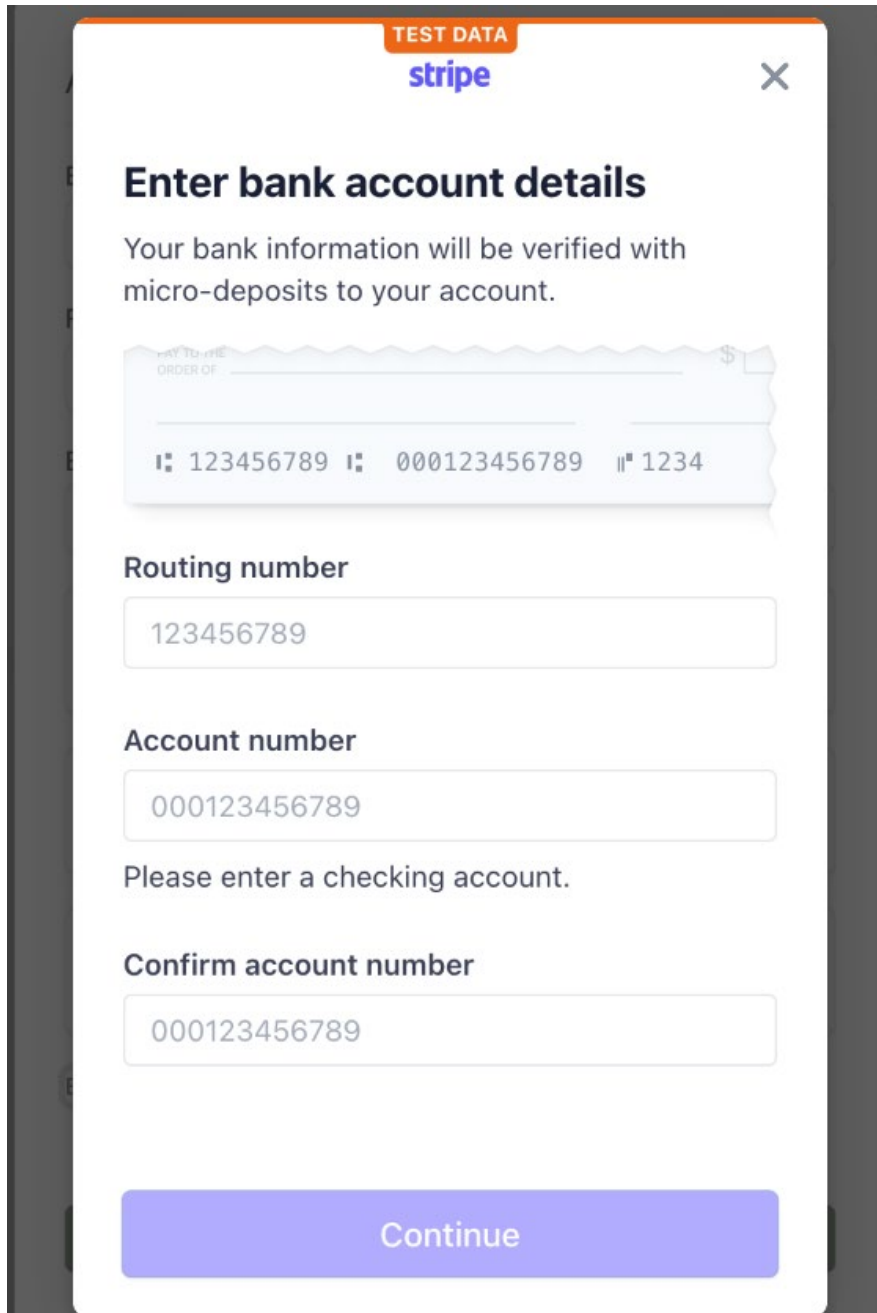
Down Bank (unscheduled)

Down Bank (unknown error)

Enter bank details manually instead (takes 1-2 business days)

Save payment method

2. Enter and confirm your routing and account numbers.

A screenshot of the Stripe 'Enter bank account details' form. At the top, there is an orange 'TEST DATA' label and the Stripe logo. The title 'Enter bank account details' is in bold. Below it, a message states: 'Your bank information will be verified with micro-deposits to your account.' A graphic of a check is shown with the following details: 'PAY TO THE ORDER OF', '\$', '123456789', '000123456789', and '1234'. The form includes input fields for 'Routing number' (containing '123456789') and 'Account number' (containing '000123456789'). Below the account number field, a prompt says 'Please enter a checking account.' followed by a 'Confirm account number' field (containing '000123456789'). A large blue 'Continue' button is at the bottom.

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