

Downloading Bank Statement Guide

We require statements to run to the date you submit your application for ALL of your accounts (even if they are not being used). Depending on when you send in your documents, this is likely to be a different date to the standard monthly statement issued by your bank. This guide provides you with details on how to download statements as a PDF for a specific date range rather than just your standard monthly statement. Please make sure the running balance is on the statement. You may need to tick a box on your online account for the balance to appear on the statement (Lloyds and NatWest).

HSBC

HSBC do not currently have a download function available for a specific date range. You should be able to request a statement via the chat on [this page](#).

One Family

OneFamily will provide a statement if requested. On their [Frequently Asked Questions - Help and Support | OneFamily](#). Under the heading Where Can I Get a Statement? you can request a statement via email here: [Connect With Us - Contact Us | OneFamily](#).

Plum

You can now download statements for your savings pockets on Plum. To do this, open the pocket and press 'more info'. You will then see the option to download statements for each month. Quarterly statements for investments can be found by accessing the 'you' section of the app. You can then select 'documents' and will see the option to download ETF statements.

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Natwest Bank Statement Guide

- Log into Natwest Online Banking and select '**Account Summary**' on the left
- Click on the option for '**view more transactions**' (this is in the middle of the page)
- On the next screen select which account you are looking for from the drop down menu in the top right of the page
- Once you have selected the correct account you can select '**or search between two dates**' found on the left under '**Time Period**'
- Select the dates required
- Press '**search**' on the bottom right
- The statement will appear below and there is an option to '**download pdf**', select this
- Open pdf, download and save
- Repeat for the other required accounts

Barclays Bank Statement Guide

- Log into Barclays Online Banking and select which account you require
- Select '**search transactions**' by scrolling down the screen
- Select the 'to and from' dates you require
- Press '**search**'
- Scroll to the bottom of the page and press '**Download all PDF**'
- Open pdf, download and save
- Repeat for the other required accounts

The screenshot shows the 'Transactions' search interface. At the top, it says 'Transactions' with a 'Close search' button. Below that, it indicates 'Showing 1-6 of 6 transactions between 1 Sep 20 and 4 Dec 20'. The search criteria are: 'From date' (01/09/2020), 'To date' (04/12/2020), and 'Containing the words (optional)' (empty field). There is a 'Search' button and a link to 'Advanced search'.

Santander Bank Statement Guide

You can do this by logging in and then going to your most recent transactions and then clicking on “download transactions”.



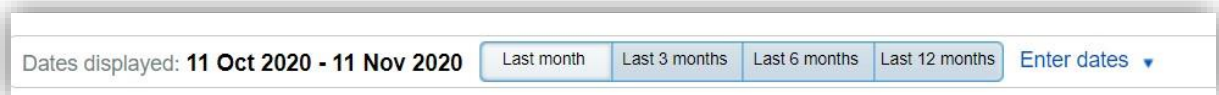
And then



This should make a PDF statement for the transactions and you can email this to us.

Nationwide Building Society Bank Statement Guide

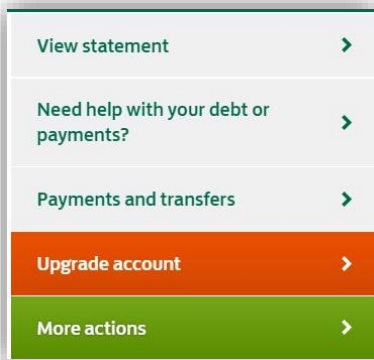
Log in and click on your account. You will see the following at the top of the current statement.



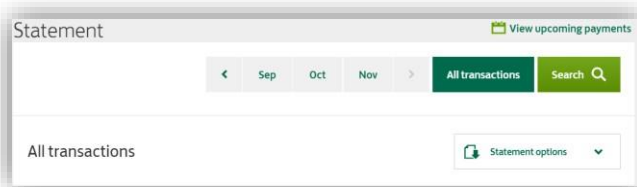
Click on ‘Enter dates.’ Input start and end date. This will download the required period and you can email this to us.

Lloyds Bank Statement Guide

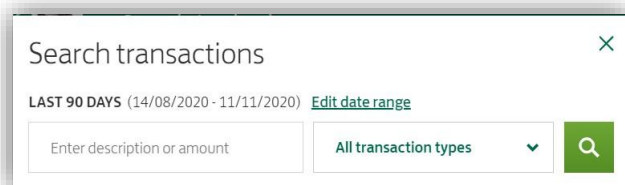
Log into main homepage and to the left of your account chose option to **'View statement'**



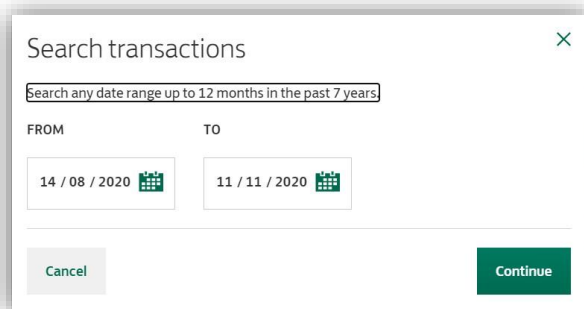
Click **'Search'** option



Click on **'Edit date range'**



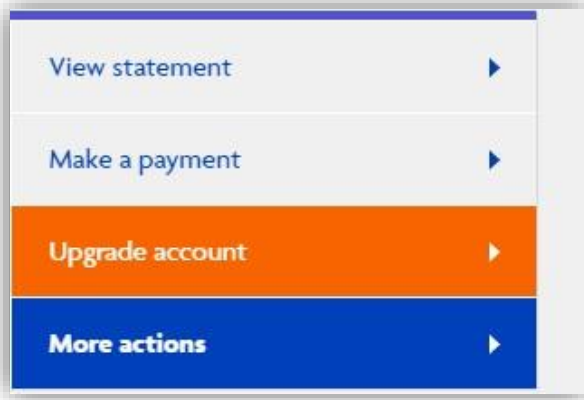
Enter start and end dates



This will download the required period and you can email this to us.

Halifax Bank Statement Guide

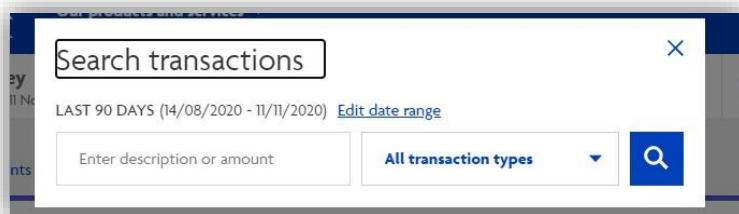
Login to your online banking and to the right of the page select “View statement”



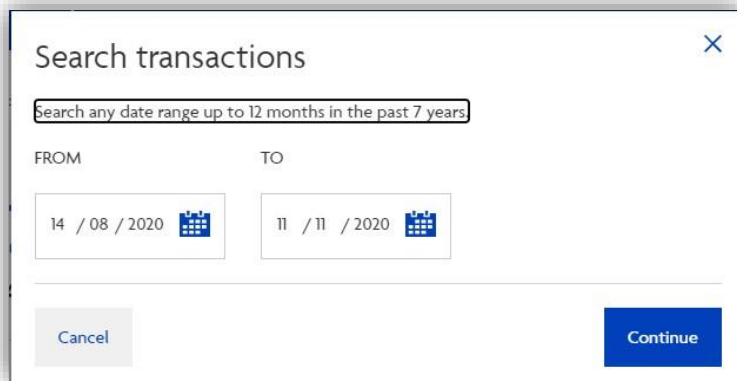
Select “Search” option



Click on “Edit date range”



Enter start and end dates



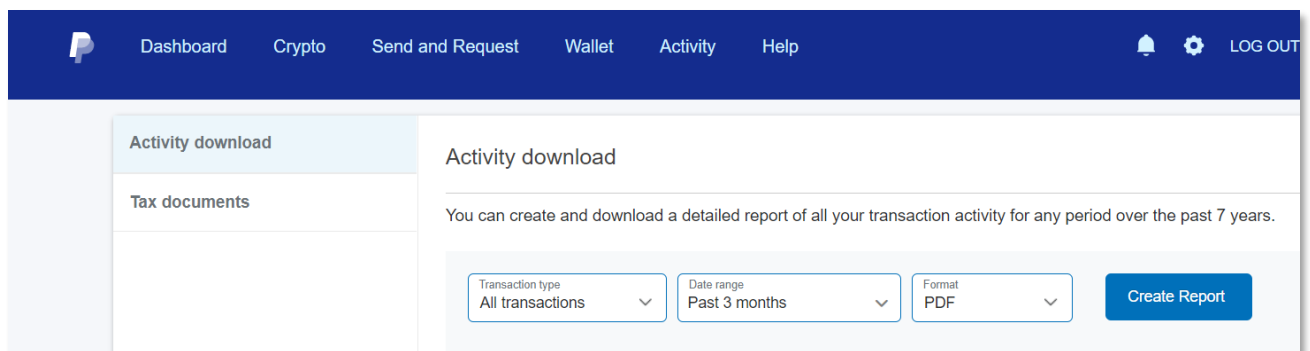
Click Continue. This will download the required period and you can email this to us.

PayPal Statement Guide

Login into your Paypal account using this link:

<https://www.paypal.com/myaccount/statements/monthly>

Select custom and pdf document format



Revolut Bank Statement Guide

Viewing my account statements

This is super easy. Go to the 'Accounts' section of the app, press 'Details', and then tap the 'Statement' button. Select the date range and file format (PDF or Excel) of your statement. Next, tap 'Get statement' and you will be able to see your account history on your screen.

If you would like to download your statement, simply tap the export icon in the top-right corner of the screen and you can download it to your phone.

Where can I find a statement for my Savings Vault?

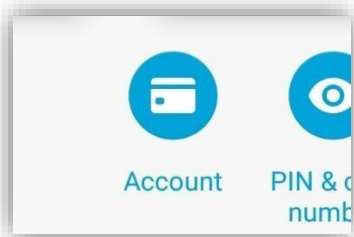
There is a Savings Vault Statement we can provide you with. To find it, simply go to your Savings Vault under 'Vaults' on the 'Wealth' section of the app, tap the 'Settings' button and then select 'Statement'. Select the date range and file format (PDF or Excel) of your statement. Next, tap 'Get statement' and you will be able to see your savings history on your screen: transactions and earned interest.

If you would like to download your statement, simply tap the export icon in the top-right corner of the screen and you can download it to your phone.

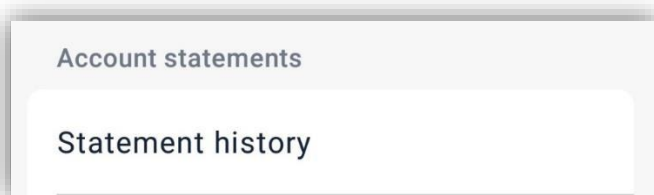
Monzo Bank Statement Guide

Download from App.

Select **'account'**.



Select **'statement history'**



Customise date range. **Select date 3 months before today's date.**

Customise date range

Export as **PDF file**.

How would you like to export these transactions?

Bank Statement (PDF)

Comma Separated (CSV)

17 July 2023