

ACCESSING YOUR ONLINE BANK STATEMENTS

When applying to the Financial Assistance Fund, submitting a bank statement as part of your application is essential. Submitting screenshots will cause a delay to the assessment of your application as we will request you resubmit with the requested PDFs. If you are registered for online banking, you should be able to access an electronic copy of your bank statement easily and quickly, in a format that can be easily included in your application pack.

Not all banks use the same process to download this information, so this can sometimes be confusing. To help make the process a little bit clearer, we have provided details and links on how to do this for a variety of banks below.

WHAT IS A BANK STATEMENT

A bank statement is a full list of all transactions in that account, showing all funds going in and out over the period of time it covers, which is usually one month. There is normally a summary page which includes an overview of the account balance, and details of the account holder. A bank statement is a formal document. Lists of transactions from a mobile banking app are not the same as a formal bankstatement.

It is likely that your bank sends you a copy of your statement each month, usually through your online account or mobile app. It is usually also possible to generate a statement from your online account that covers a specific period of time.

WHAT INFORMATION IS NEEDED

We need you to submit bank statements for all accounts held in your name, even if it is for an account you don't use. These statements should cover three months' worth of transactions and should be recent. Statements should show funding such as your student loan instalment being paid into your account and rent payments being made. We cannot accept screenshots.

You should also think about any information that you want us to see in your bank statement. If you are using this to provide evidence of a particular expense, make sure it covers the period that shows this evidence. You may wish to add notes to your bank statement to explain transactions or draw our attention to detail that you feel is important, but you should not delete or obscure any of the detail.

ONLINE BANKING VERSUS MOBILE BANKING APP

While mobile banking apps are a great way to keep a close eye on your bank accounts and your spending, they might not offer the full range of services that will allow you to access your bank statements. This means that you might have to access your online banking through a webpage, instead of through your mobile app.

Most mobile banking apps allow you to access the messages your bank send you. Look for an inbox. In this inbox, you may find that your bank sends you monthly statements that can easily be downloaded as PDF documents.

Remember, we need a copy of your bank statement, which is a formal document. We cannot accept screenshots of transactions on your mobile banking app.

Below we have input the instructions for a few banks to give you an idea of what to look for. We also have links to the correct pages for a range of banks so you can simply click on your bank to find this. If your bank is not listed, try the help or customer support sections of your online banking to find the instructions for your specific organisation. Some banks also have videos on their YouTube channel that can walk you through how to download statements.

SANTANDER

1. Log in to your online banking and select the relevant account.
2. Select 'E-documents' from the menu on the left-hand side.
3. Select the statement you want to download, and a PDF document will open.

Remember we need to see statements covering a 3-month period, and these should be as recent as possible.

4. You can now save this and may need to repeat this if you have more than one account.

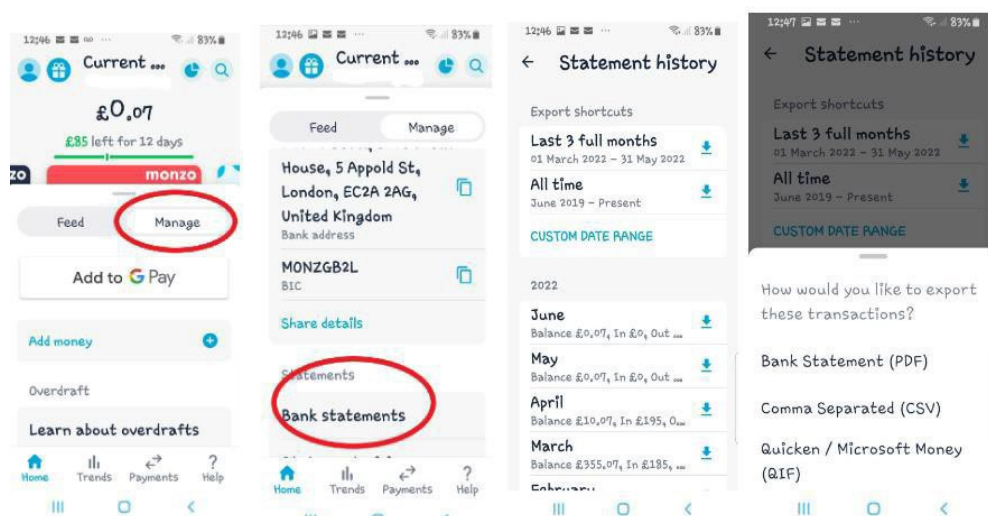
Further information on how to download a PDF bank statement can be viewed [here](#).

MONZO – this one can be done on a phone

1. Open the Monzo app and select the account you want.
2. Use your swiper to change it from 'Feed' to 'Manage'.
3. Scroll down to bank statements where you will see a list of all monthly statements.

Remember we need to see statements covering a 3-month period, and these should be as recent as possible.

4. You select the statement you want, and it will give you the option of Bank Statement (pdf).



NATIONWIDE

1. Log into online banking.
2. On the account you wish, go to the drop-down boxes on the right.
3. Select 'Statements' and hit 'GO'.
4. On the following page simply select the month you wish to download.



Further information on how to download a PDF bank statement can be viewed [here](#).

Remember we need to see statements covering a 3-month period, and these should be as recent as possible

LLOYDS BANK

1. Log into your banking app. From the home page select the [...] next to the relevant account
2. Scroll down to the 'Manage Account' section and select 'Download or Print Statements'.
3. This will bring up a new window where you can select the statements month by month. Each month will open as a PDF and can be saved.
4. Repeat Step 3 for each month you require, and Steps 1, 2 and 3 for each account you have.

Remember we need to see statements covering a 3-month period, and these should be as recent as possible.

1.



2.



3.



OTHER BANKS

You can find details on how to download applications for other banks by clicking on the following links:

[NATWEST](#)

[HSBC](#)

[BARCLAYS](#)

[CO-OPERATIVE](#)

[TSB](#) – Go to the part about Digital Inbox

[ROYAL BANK OF SCOTLAND](#)

[CLYDESDALE](#)

[FIRST DIRECT](#)

[REVOLUT](#)

[CHASE](#)

If your bank is not listed, there will be a guide somewhere on their website to tell you how to download a statement. Banks in the UK usually let you download statements for up to 7 years. Try an internet search for “how to download a *[insert bank name]* statement” Or use the help or customer support pages on the bank’s own website to find out how to download a statement. ***Remember we need to see statements covering a 3-month period, and these should be as recent as possible.***