

Case Study: Care & Specialist Education

Summergil (Orbis Special Education and Care)

Summergil School (formerly Womaston House School) provides education facilities and residential accommodation for children with complex needs associated with autism. Located in Powys, the school is surrounded by 18 acres of fields and woodlands. The old school comprised of several dilapidated buildings plus a modern sports and leisure facility. Following acquisition in 2016 by Orbis Education and Care, a major refurbishment project was carried out.



✧ How much was the claim worth?

£1.2m

capital allowances
uncovered

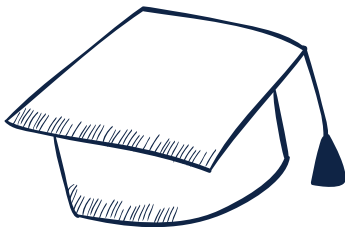
£225k

unlocked in
total tax savings

2016

Property
purchase date

✧ About the claim











As specialists in capital allowances and property related tax, Zeal were engaged by Orbis to carry out a capital allowances review of the purchase and refurbishment costs for Summergil School to identify any missed claims for tax relief.

Our team of qualified property surveyors and tax specialists assessed the value of capital allowances due on the purchase of the school and carried out a detailed review of the contractor's refurbishment costs.

A technical site survey identified over £1.2m in unclaimed capital allowances and secured significant additional tax relief for Orbis. This generated corporation tax savings of more than £225k.

✧ Qualifying items

- | | |
|---|--|
|  Electrical and lighting systems |  Disposal installations |
|  Heating and ventilation systems |  TV and Phone ports |
|  Hot and cold water systems |  Ironmongery |
|  Kitchens and bathrooms |  Fire and security alarms |



What our client said... **Karl DeGelas, Group Financial Controller**

"We have worked with the team over the past few years to help us optimise the tax relief on our investments in our education and care facilities. Their specialist knowledge and expertise has provided us with significant tax savings that we were not aware we could claim. We have been extremely happy with the level of service provided to us and would highly recommend that those in the education and care sector seek their advice."



ZEAL

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