

Case Study: Care & Specialist Education

Ty Carreg (Orbis Special Education and Care)

Ty-Carreg is a specialist residential care facility, located in Aberthaw, South Wales. The 12-bedroom property is owned and managed by Orbis Education & Care and provides support and living accommodation for adults with complex needs associated with autism. As a purpose-built property, facilities were designed and fitted out to a specification that meets the residents' precise needs.



How much was the claim worth?

£1.9m

capital allowances
uncovered

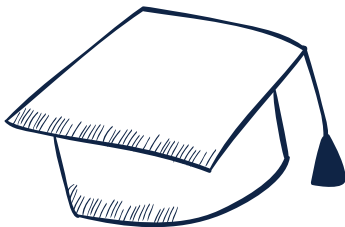
£379k

unlocked in
total tax savings

2018

Property
purchase date

About the claim



The facility was purpose built for Orbis. Upon completion, the finished building was acquired from the developer. As Orbis paid a fixed sum for the property, there was no detailed breakdown of the costs of the fixtures purchased with the building that would qualify for capital allowances.

Working alongside Orbis's accountants, our team of qualified property surveyors and tax specialists carried out a technical site survey and calculated the value of qualifying fixtures acquired with the building. A detailed capital allowances valuation report outlining these findings was also prepared and submitted to HMRC.

Almost £2m in unclaimed capital allowances was identified, unlocking corporation tax savings of £379k for Orbis.

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."



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