

Case Study: Summergil (Orbis Special Education & Care)

Care & Specialist Education



2016

property
purchase date

Summergil House (formerly Womaston House School) provides education facilities and residential accommodation for children with complex needs associated with autism. Located in Powys, the school is 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.

£1.2m

capital allowances
uncovered

Overview of the claim

As specialists in capital allowances and property related tax, Zeal were engaged by Orbis to carry out a capital allowances review on Summergil House to identify any missed claims for tax relief. Our team of qualified property surveyors and tax experts assessed the value of allowances due on the purchase of the school and carried out a detailed review of the contractor's refurbishment costs.










£225k

unlocked in
total tax savings

The result

Working alongside Orbis' accountants, Zeal prepared detailed reports that were submitted to HMRC in support for the claims to tax relief. 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:

 Lighting and Electric Systems	 Carpets and Flooring	 TV and Phone Ports
 Heating and Ventilation Systems	 Security and Fire Alarms	 Ironmongery
 Water Systems and Drainage	 Kitchens and Bathrooms	 Disposal Installations



"We have worked with the team for 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."



Karl DeGelas,
Group Financial Controller