

Case Study: Ty Carreg (Orbis Special Education & Care)

Care & Specialist Education



2018

property
purchase date

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.

£1.9m

capital allowances
uncovered

Overview of 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.










£379k

unlocked in
total tax savings

The result

Working alongside Orbis' accountants, our team of in-house 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:

 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