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Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

2010Department of the Treasury
Internal Revenue Service

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2010, or tax year beginning , and ending

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Name of foundation WILLIAM M. CAGE LIBRARY TRUST		A Employer identification number 54-6350104
Number and street (or P O box number if mail is not delivered to street address) 321 WILLIAM STREET	Room/suite	B Telephone number (540) 373-4331
City or town, state, and ZIP code FREDERICKSBURG, VA 22401		C If exemption application is pending, check here ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,218,524. (Part I, column (d) must be on cash basis.)	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		2.	2.		STATEMENT 1
4 Dividends and interest from securities		34,070.	34,070.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		431.			
b Gross sales price for all assets on line 6a		431.			
7 Capital gain net income (from Part IV, line 2)			431.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		<4,487.>	<4,487.>		STATEMENT 3
12 Total. Add lines 1 through 11		30,016.	30,016.		
13 Compensation of officers, directors, trustees, etc		12,207.	3,052.		9,155.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees		1,500.	375.		1,125.
c Other professional fees					
17 Interest		63.	63.		0.
18 Taxes		361.	361.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses		1,112.	0.		1,112.
24 Total operating and administrative expenses. Add lines 13 through 23		15,243.	3,851.		11,392.
25 Contributions, gifts, grants paid		44,760.			44,760.
26 Total expenses and disbursements. Add lines 24 and 25		60,003.	3,851.		56,152.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<29,987.>			
b Net investment income (if negative, enter -0-)			26,165.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		6,933.	7,081.	7,081.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock STMT 7		429,835.	429,835.	834,036.
	c	Investments - corporate bonds STMT 8		25,256.	25,256.	27,113.
11	Investments - land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 9		363,573.	333,492.	349,698.	
14	Land, buildings, and equipment; basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶ STATEMENT 10)		650.	596.	596.	
16	Total assets (to be completed by all filers)		826,247.	796,260.	1,218,524.	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		0.	0.	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☐				
		and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here ▶ ☒				
		and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds		0.	0.	
28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.		
29	Retained earnings, accumulated income, endowment, or other funds		826,247.	796,260.		
30	Total net assets or fund balances		826,247.	796,260.		
31	Total liabilities and net assets/fund balances		826,247.	796,260.		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	826,247.
2	Enter amount from Part I, line 27a	2	<29,987.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	796,260.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	796,260.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a KINDER MORGAN ENERGY	P		
b CAPITAL GAINS DIVIDENDS			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 7.			7.
b 424.			424.
c			
d			
e			

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			7.
b			424.
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	431.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }	3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	63,841.	1,110,323.	.057498
2008	77,644.	1,431,689.	.054232
2007	75,213.	1,559,808.	.048219
2006	67,159.	1,511,507.	.044432
2005	67,754.	1,386,147.	.048879

2 Total of line 1, column (d)	2	.253260
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.050652
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	1,183,597.
5 Multiply line 4 by line 3	5	59,952.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	262.
7 Add lines 5 and 6	7	60,214.
8 Enter qualifying distributions from Part XII, line 4	8	56,152.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.
See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	523.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	523.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	523.
6 Credits/Payments:			
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		11.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		534.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☐ \$ 0. (2) On foundation managers. ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2	X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5	X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ VA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► JOHN C COWAN, TRUSTEE Located at ► 321 WILLIAM ST, FREDERICKSBURG, VA Telephone no. ► (540) 373-4331 ZIP+4 ► 22401-5831			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes No	X X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?		1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? If "Yes," list the years ►	☐ Yes ☒ No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?		4b X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOHN C COWAN 321 WILLIAM ST FREDERICKSBURG, VA 22401	TRUSTEE 4.00	12,207.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,191,676.
b	Average of monthly cash balances	1b	9,945.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,201,621.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,201,621.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	18,024.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,183,597.
6	Minimum investment return. Enter 5% of line 5	6	59,180.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	59,180.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	523.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	523.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	58,657.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	58,657.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	58,657.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	56,152.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	56,152.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	56,152.

Note The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				58,657.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			44,760.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2010 from Part XII, line 4: ▶ \$ 56,152.				
a Applied to 2009, but not more than line 2a			44,760.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2010 distributable amount				11,392.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				47,265.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test - enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)**1 Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed:

SEE STATEMENT 11

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | Yes | No |
|----------|--|-------|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date _____

Title

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if
self-employed

PTIN	
------	--

HARRY B F FRANKLIN,
JR.

HARRY B F FRANKLI

08/03/11

Firm's name ► **BOWLING, FRANKLIN & CO., LLP**

Firm's EIN ▶

Firm's address ► 1207 CHARLES STREET
FREDERICKSBURG, VA 22401

Phone no. (540) 373-8973

Form **990-PF** (2010)

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
BB&T CHECKING	2.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	2.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
ANDERSON & STRUDWICK	32,669.	424.	32,245.
ANDERSON & STRUDWICK	1,563.	0.	1,563.
KINDER-MORGAN ENERGY PARTNERS	262.	0.	262.
TOTAL TO FM 990-PF, PART I, LN 4	34,494.	424.	34,070.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
KINDER MORGAN ENERGY PARTNERS	<4,487.>	<4,487.>	
TOTAL TO FORM 990-PF, PART I, LINE 11	<4,487.>	<4,487.>	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPERATION	1,500.	375.		1,125.
TO FORM 990-PF, PG 1, LN 16B	1,500.	375.		1,125.

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
TAX ON INVESTMENT INCOME	361.	361.		0.	
TO FORM 990-PF, PG 1, LN 18	361.	361.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
SUPPLIES	198.	0.		198.	
COMMISSIONER OF ACCOUNTS	883.	0.		883.	
CLERK OF COURT	31.	0.		31.	
TO FORM 990-PF, PG 1, LN 23	1,112.	0.		1,112.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	7
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
CORPORATE STOCK - SEE ATTACHED LISTING	429,835.	834,036.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	429,835.	834,036.		

FORM 990-PF	CORPORATE BONDS		STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
CORPORATE BONDS - SEE ATTACHED LISTING	25,256.	27,113.		
TOTAL TO FORM 990-PF, PART II, LINE 10C	25,256.	27,113.		

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	9
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OTHER INVESTMENTS - SEE ATTACHED LISTING	COST	333,492.	349,698.
TOTAL TO FORM 990-PF, PART II, LINE 13		333,492.	349,698.

FORM 990-PF	OTHER ASSETS	STATEMENT	10
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
DIVIDENDS IN TRANSIT	650.	596.	596.
TO FORM 990-PF, PART II, LINE 15	650.	596.	596.

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT 11
	PART XV, LINES 2A THROUGH 2D	

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JOHN C COWAN
321 WILLIAM STREET
FREDERICKSBURG, VA 224015831

TELEPHONE NUMBER

(540) 373-4331

FORM AND CONTENT OF APPLICATIONS

APPLICATION IN FORM OF LETTER REQUESTING A GRANT MUST INCLUDE A STATEMENT THAT THE FUNDS WIL BE USED AS SET FORTH IN THE WILL.

ANY SUBMISSION DEADLINES

DECEMBER 1 OF EACH YEAR

RESTRICTIONS AND LIMITATIONS ON AWARDS

RECIPIENTS MUST BE A LIBRARY LOCATED IN THE STATE OF VIRGINIA, MAXIMUM GRANT \$500.00 PER YEAR AND PER RECIPIENT.

END OF YEAR

SHARES	SECURITY	BOOK VALUE (COST)	MARKET VALUE
PART II LINE 10b			
1890	BB&T CORP	47,715	49,688
1000	BAXTER INTERNATIONAL INC	7,530	50,620
1000	BAXTER INTERNATIONAL INC	26,750	50,620
3000	CAPITAL ONE FINANCIAL CORP	25,346	127,680
250	CISCO SYSTEMS INC	16,849	5,058
250	CISCO SYSTEMS INC	5,763	5,058
600	CONOCO PHILLIPS	3,198	40,860
777	DPL INC	3,629	19,977
469	DTE ENERGY	4,254	21,255
586	DUKE ENERGY	6,228	10,437
414	DUKE ENERGY	7,995	7,373
800	EL PASO CORP	12,918	11,008
1200	EL PASO CORP	16,700	16,512
3978	EXELON CORP	35,006	165,644
286	FIRSTENERGY CORP	7,308	10,588
714	FIRSTENERGY CORP	15,066	26,432
250	INTEL CORP	15,839	5,257
250	INTEL CORP	7,672	5,257
1000	J P MORGAN CHASE & CO	42,931	42,420
1200	J P MORGAN CHASE & CO	42,579	50,904
192	MEDCOHEALTH SOLUTIONS INC	20,553	11,764
100	NSTAR	1,600	4,219
900	NSTAR	11,354	37,971
1000	NSTAR	12,954	42,190
1000	REDDY ICE HOLDINGS	21,845	2,750
500	SPECTRA ENERGY CORP	10,253	12,495
	TOTALS	<u>429,835</u>	<u>834,036</u>
PART II LINE 10c			
25000	DUKE CAPITAL CORP SENIOR NOTE 6 25% - 02/15/2002	<u>25,256</u>	<u>27,113</u>
	TOTALS	<u>25,256</u>	<u>27,113</u>
PART II LINE 13			
700	KINDER MORGAN ENERGY PARTNERS L P	6,389	49,182
1250	COMMONWEALTH REIT COM SBI *	51,756	31,888
5000	MONMOUTH REAL ESTATE INV TRUST *	24,585	42,500
1000	NATIONAL HEALTH INVESTORS, INC *	26,237	45,020
200	SENIOR HOUSING PARTNERS TRUST *	2,284	4,388
1000	COHEN & STEERS REIT & PFD INCOME FUND	31,517	14,290
1000	EATON VANCE TAX MANAGED GLOBAL FUND *	18,580	10,530
2000	NUVEEN DIVERSIFIED DIVIDEND & INCOME FUND	30,005	21,780
1000	NUVEEN EQUITY PREMIUM ADV FUND *	18,816	12,900
1000	NUVEEN MULTI STRATEGY & INCOME FUND *	14,903	8,800
126016	45 FEDERATED CAPITAL RESERVES	<u>108,420</u>	<u>108,420</u>
	TOTALS	<u>333,492</u>	<u>349,698</u>
	* - reduced by non-dividend distributions		

William M. Cage Library Trust
EIN 54-6350104
Form 990-PF
2010

Abbs Valley Boissevain Elementary School P.O. Box 69 Boissevain, VA 24606	348.00
Accawmacke Elementary School 26230 Drunimondtown Rd Accomac, VA 23420	500.00
A.G. Wright Middle School 100 Wood Dr Stafford, VA 22556	348.00
Albert Harris Elementary School 710 Smith Rd Martinsville, VA 24112	500.00
Amherst County Museum 154 South Main St Amherst, VA 24521	348.00
Amherst County Public Library 382 South Main St Amherst, VA 24521	500.00
Anne E. Moncure Elementary School 75 Moncure Ln Stafford, VA 22554	348.00
Arcadia Middle School P. O. Box 69 Oak Hall, VA 23416	500.00
Arcadia High School 8210 Lankford Hwy Oak Hill, VA 23415	500.00

Battlefield Elementary School 11108 Leavells Rd Fredericksburg, VA 22407	348.00
Battlefield Middle School 11120 Leavells Rd Fredericksburg, VA 22407	348.00
Berkeley Elementary School 5979 Partlow Rd Spotsylvania, VA 22553	348.00
Bowling Green Primary School 17176 Richmond Turnpike Milford, VA 22514	348.00
Brock Road Elementary School 10207 Brock Rd Spotsylvania, VA 22553	348.00
Carlisle School 300 Carlisle Rd Axton, VA 24054	500.00
Central Rappahannock Regional Library 1201 Caroline St Fredericksburg, VA 22401	500.00
Chancellor Elementary School 5995 Plank Rd Fredericksburg, VA 22407	348.00
Chancellor High School 6300 Harrison Rd Fredericksburg, VA 22407	348.00
Chancellor Middle School 6320 Harrison Rd Fredericksburg, VA 22407	348.00
Chincoteague Elementary School 6078 Hallie Whealton Smith Dr Chincoteague, VA 23336	500.00

Chincoteague High School 4586 Main St Chincoteague, VA 23418	500.00
Churchland Academy 4061 River Shore Rd Portsmouth, VA 23703	348.00
Churchland Elementary School 5601 Michael Ln Portsmouth, VA 23703	348.00
Churchland High School 4301 Cedar Ln Portsmouth, VA 23703	348.00
Churchland Middle School 4051 River Shore Rd Portsmouth, VA 23703	348.00
Colonial Forge High School 550 Courthouse Rd Stafford, VA 22554	348.00
Courthouse Road Elementary School 9911 Courthouse Rd Spotsylvania, VA 22553-1703	348.00
Courtland Elementary School 6601 Smith Station Rd Spotsylvania, VA 22553	348.00
Courtland High School 6701 Smith Station Rd Spotsylvania, VA 22553	348.00
Dixon-Smith Middle School 503 Deacon Rd Fredericksburg, VA 22405	348.00
DoDEA – Dahlgren School Naval Support Facility Dahlgren Building 193 Dahlgren School 6117 Sampson Rd, Ste 206 Dahlgren, VA 22448-5166	348.00

Douglass Park Elementary School 34 Grand St Portsmouth, VA 23701	348.00
Eastern Shore Public Library P.O. Box 360 Accomac, VA 23301	500.00
Edward Drew Middle School 501 Cambridge St Falmouth, VA 22405	348.00
Essex High School 833 High School Circle Tappahannock, VA 22560	348.00
Excell Campus P.O. Box 998 Portsmouth, VA 23705	348.00
Falmouth Elementary School 1000 Forbes St Falmouth, VA 22405	348.00
Ferry Farm Elementary School 20 Pendleton Rd Fredericksburg, VA 22405	348.00
Freedom Middle School 7315 Smith Station Rd Fredericksburg, VA 22407	348.00
Garrisonville Elementary School 100 Wood Dr Stafford, VA 22554	348.00
Grafton Village Elementary School 501 Deacon Rd Fredericksburg, VA 22405	348.00
Grimes Memorial School 13755 Spicers Mill Rd Orange, VA 22960	500.00

H.H. Poole Middle School 800 Eustace Rd Stafford, VA 22554	348.00
Hampton Oaks Elementary School 107 Northampton Blvd Stafford, VA 22554	348.00
Harrison Road Elementary School 6230 Harrison Rd Fredericksburg, VA 22407	348.00
Hartwood Elementary School 14 Shackelford Well Rd Hartwood, VA 22406	348.00
Hines Middle School 561 McLawhorne Dr Newport News, VA 23601	348.00
Hodges Manor Elementary School 1201 Cherokee Rd Portsmouth, VA 23701	348.00
Holy Cross Academy 250 Stafford Lakes Parkway Fredericksburg, VA 22406	348.00
Hugh Mercer School Fredericksburg Public Schools 817 Princess Anne St Fredericksburg, VA 22401-5819	348.00
I.C. Norcom High School P.O. Box 998 Portsmouth, VA 23705	348.00
James Monroe High School 817 Princess Anne St Fredericksburg, VA 22401-5819	348.00
John Redd Smith Elementary School 40 School Dr Collinsville, VA 24078	500.00

Kate Waller Barrett Elementary School 150 Duffey Dr Stafford, VA 22554	348.00
Kegotank Elementary School 13300 Lankford Hwy Mappsville, VA 23407	500.00
King George High School 8246 Dahlgren Rd King George, VA 22485	348.00
King George Middle School 8246 Dahlgren Rd King George, VA 22485	348.00
Lakeview Elementary School 130 Home Ave Portsmouth, VA 23701-3199	348.00
Lee Hill Elementary School 3600 Lee Hill School Dr Fredericksburg, VA 22408	348.00
Livingston Elementary School 6057 Courthouse Rd Spotsylvania, VA 22553	348.00
Margaret Brent Elementary School 2125 Mountain View Rd Stafford, VA 22556	348.00
Martinsville High School 351 Commonwealth Blvd Martinsville, VA 24112	500.00
Martinsville Middle School 201 Brown St Martinsville, VA 24112	500.00
Massanutten Regional Library 174 South Main St Harrisonburg, VA 22801	500.00

Massanutten Regional Library 174 South Main St Harrisonburg, VA 22801	500.00
Massanutten Regional Library (Grottoes Branch) 174 South Main St Harrisonburg, VA 22801	500.00
Massaponax High School 8201 Jefferson Davis Hwy Fredericksburg, VA 22401	348.00
Mountain View High School 2135 Mountain View Rd Stafford, VA 22556	348.00
Nandua High School 26350 Lankford Hwy Onley, VA 23418	500.00
Ni River Middle School 11632 Catharpin Rd Spotsylvania, VA 22556	348.00
North River Library 118 Mount Crawford Ave Bridgewater, VA 22812	348.00
North Stafford High School 839 Garrisonville Rd Stafford, VA 22812	348.00
Occohannock Elementary School 4208 Seaside Rd Exmore, VA 23350	500.00
Olive Branch Elementary School 415 Mimosa Rd Portsmouth, VA 23701	348.00
Page Public Library 100 Zerkel St Luray, VA 22835	348.00

Parkside Elementary School 5620 Smith Station Rd Fredericksburg, VA 22407	500.00
Park View School 1401 Crawford Pkwy Portsmouth, VA 23704	348.00
Patrick Henry Elementary School 4643 Taney Ave Alexandria, VA 22304	500.00
Poe Museum 1914-16 E. Main St Richmond, VA 23223	500.00
Post Oak Middle School 6959 Courthouse Rd Spotsylvania, VA 22553	348.00
Pungoteague Elementary School 28480 Bobtown Rd Melfa, VA 23410	500.00
Rappahannock High School 6914 Richmond Rd Warsaw, VA 22572	348.00
Rappahannock Legal Services 910 Princess Anne St, Second Floor Fredericksburg, VA 22401	500.00
Richmond County Elementary School 361 Walnut St Warsaw, VA 22572	348.00
Richmond County Intermediate School 13207 Historyland Highway Warsaw, VA 22572	348.00
Riverbend High School 12301 Spotswood Furnace Rd Fredericksburg, VA 22407	376.00
Riverview Elementary School 7001 N. Roxbury Mill Rd Spotsylvania, VA 22553-2441	348.00

Robert E. Lee Elementary School 7415 Brock Rd Spotsylvania, VA 22553	348.00
Rockhill Elementary School 50 Wood Dr Stafford, VA 22554	348.00
Rodney E. Thompson Middle School 75 Walpole St Stafford, VA 22554	348.00
Salem Elementary School 4501 Jackson Rd Fredericksburg, VA 22401	348.00
Shenandoah Community Library 418 S. Third St Shenandoah, VA 22849	348.00
Shirley C. Heim Middle School 320 Telegraph Rd Stafford, VA 22554	348.00
Simonsdale Elementary School 132 Byers Ave Portsmouth, VA 23701	348.00
University of Mary Washington 1801 College Ave Fredericksburg, VA 22401	500.00
Smith Station Elementary School 7320 Smith Station Rd Fredericksburg, VA 22407-1738	348.00
Southwestern Elementary School 4410 Airline Blvd Chesapeake, VA 23321	348.00
Spotswood Elementary School 400 Lorraine Ave Fredericksburg, VA 22408	348.00
Spotsylvania Middle School 8801 Courthouse Rd Spotsylvania, VA 22553	348.00

Spotsylvania High School 6975 Courthouse Rd Spotsylvania, VA 22553	348.00
T.C. Williams Law Library 28 Westhampton Way Richmond, VA 23173	500.00
Tangier Combined School 4375 School Ln Tangier, VA 23440	500.00
Tazewell Elementary School 101 Parkview Dr Tazewell, VA 24651	500.00
Tazewell High School 627 E Fincastle Rd Tazewell, VA 24651	500.00
Thornburg Middle School 6929 N. Roxbury Mill Rd Spotsylvania, VA 22553-2439	348.00
Victory Elementary School 12001 Tygart Lake Dr Bristow, VA 20136	348.00
Virginia Marine Science Museum 717 General Booth Blvd Virginia Beach, VA 23451	500.00
Walker Grant Middle School One Learning Ln Fredericksburg, VA 22401	348.00
Walker Grant (Original) School 200 Gunnery Rd Fredericksburg, VA 22401	348.00
Westhaven Elementary School 3801 Clifford St Portsmouth, VA 23707-3997	348.00
Widewater Elementary School 101 Den Rich Rd Stafford, VA 22554	348.00

Wilderness Elementary School 11600 Catharpin Rd Spotsylvania, VA 22553	348.00
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William E. Waters Middle School P.O. Box 998 Portsmouth, VA 23605	348.00
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Woodland Academy 2054 Neenah Rd Montross, VA 22520	348.00
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Woodrow Wilson High School 1401 Elmhurst Ln Portsmouth, VA 23701	348.00
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	<u>\$ 44,760.00</u>
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Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization	Employer identification number
	WILLIAM M. CAGE LIBRARY TRUST	54-6350104
	Number, street, and room or suite no. If a P.O. box, see instructions. C/O BOWLING, FRANKLIN & CO., LLP, 1207 CHARLES STREET	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. FREDERICKSBURG, VA 22401	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

JOHN C COWAN, TRUSTEE

- The books are in the care of ► **321 WILLIAM ST - FREDERICKSBURG, VA 22401-5831**
Telephone No. ► **(540) 373-4331** FAX No. ► ☐

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2011**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☒ calendar year **2010** or
► ☐ tax year beginning _____, and ending _____

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	0.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

LHA For Paperwork Reduction Act Notice, see Instructions.

Form 8868 (Rev. 1-2011)