

CATERPILLAR INC
Form S-8
August 17, 2010

As filed with the Securities and Exchange Commission on August 16, 2010

Registration No. 333-_____

UNITED STATES
SECURITIES AND EXCHANGE COMMISSION

WASHINGTON, D.C. 20549

FORM S-8

REGISTRATION STATEMENT UNDER THE

SECURITIES ACT OF 1933

CATERPILLAR INC.
(Exact Name of Registrant as Specified in Its Charter)

Delaware
(State of Incorporation)

37-0602744
(IRS Employer Identification No.)

100 NE Adams Street
Peoria, Illinois 61629
(Address of Principal Executive Offices)

Caterpillar 401(k) Plan
(Full Title of the Plan)

James B. Buda
Vice President, Secretary and Chief Legal Officer
Caterpillar Inc.
100 NE Adams Street
Peoria, IL 61629-7310
(309) 675-4429

(Name, Address and Telephone Number, Including Area Code, of Agent for Service)

Indicate by check mark whether the registrant is a large accelerated filer, an accelerated filer, a non-accelerated filer, or a smaller reporting company. See the definitions of "large accelerated filer," "accelerated filer" and "smaller reporting company" in Rule 12b-2 of the Exchange Act. (Check one):

| | | |
|-------------------------|-------------------------------------|---------------------------|
| Large accelerated filer | <input checked="" type="checkbox"/> | Accelerated filer |
| Non-accelerated filer | <input type="checkbox"/> | Smaller reporting company |

CALCULATION OF REGISTRATION FEE

| Title of securities to be registered | Amount to be registered | Proposed maximum offering price per share | Proposed maximum aggregate offering price | Amount of registration fee |
|------------------------------------------|--------------------------|-------------------------------------------|-------------------------------------------|----------------------------|
| Common Stock, par value \$1.00 per share | 55,000,000 shares (1) | \$67.39 (2) | \$3,706,450,000 | \$264,269.89 |

(1) Pursuant to Rule 416 under the Securities Act of 1933, as amended (the “Securities Act”), this Registration Statement also covers an indeterminate amount of additional securities that may be issued under the Plan pursuant to the anti-dilution provisions of the Plan.

(2) Estimated solely for the purposes of calculating the registration fee, computed pursuant to Rules 457(c) and (h) under the Securities Act on the basis of the average of the high and low sales prices of a share of Caterpillar Inc. Common Stock, as reported on the New York Stock Exchange - Composite Transactions System on August 12, 2010.

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Part I

EXPLANATORY NOTE

This Registration Statement on Form S-8 is being filed to register an additional 55,000,000 shares of the Registrant’s Common Stock, par value \$1.00 per share, to be issued pursuant to the Caterpillar 401(k) Plan, as amended (the “Plan”). In accordance with General Instruction E to Form S-8, the Registrant and the Plan hereby incorporate by reference the contents of the following Registration Statements previously filed by the Registrant and the Plan:

- Registration Statement on Form S-8 (Registration No. 333-111355) filed December 19, 2003, as amended by Post-Effective Amendment No. 1 to Form S-8 filed November 19, 2004; and
 - Registration Statement on Form S-8 (Registration No. 333-133265) filed April 13, 2006.

Part II

INFORMATION REQUIRED IN THE REGISTRATION STATEMENT

Item 8. Exhibits.

The following is a complete list of exhibits filed as a part of this Registration Statement:

| Exhibit No. | Description |
|-------------|---------------------------------------|
| <u>23.1</u> | Consent of PricewaterhouseCoopers LLP |

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| | | |
|-----------------|-------------------------------------------------|--------------------------------------------|
| August 16, 2010 | /s/Gerard R. Vittecoq (Gerard R. Vittecoq) | Group President |
| August 16, 2010 | /s/Steven H. Wunning (Steven H. Wunning) | Group President |
| August 16, 2010 | /s/Jananne A. Copeland (Jananne A. Copeland) | Controller and Chief Accounting Officer |

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|-----------------|-------------------------------------------------|----------|
| August 16, 2010 | /s/W. Frank Blount (W. Frank Blount) | Director |
| August 16, 2010 | /s/John R. Brazil (John R. Brazil) | Director |
| August 16, 2010 | /s/Daniel M. Dickinson (Daniel M. Dickinson) | Director |
| August 16, 2010 | /s/John T. Dillon (John T. Dillon) | Director |
| August 16, 2010 | /s/Eugene V. Fife (Eugene V. Fife) | Director |
| August 16, 2010 | /s/Gail D. Fosler (Gail D. Fosler) | Director |
| August 16, 2010 | /s/Juan Gallardo (Juan Gallardo) | Director |
| August 16, 2010 | /s/David R. Goode (David R. Goode) | Director |
| August 16, 2010 | /s/Peter A. Magowan (Peter A. Magowan) | Director |
| August 16, 2010 | /s/William A. Osborn (William A. Osborn) | Director |
| August 16, 2010 | /s/Charles D. Powell (Charles D. Powell) | Director |
| August 16, 2010 | /s/Edward B. Rust, Jr. (Edward B. Rust, Jr.) | Director |

| | | |
|-----------------|-----------------------------------------|----------|
| August 16, 2010 | /s/Susan C. Schwab (Susan C. Schwab) | Director |
|-----------------|-----------------------------------------|----------|

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| August 16, 2010 | /s/Joshua I. Smith (Joshua I. Smith) | Director |
|-----------------|-----------------------------------------|----------|

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Pursuant to the requirements of the Securities Act of 1933, as amended, the trustees (or other persons who administer the Plan) have duly caused this Registration Statement to be signed on its behalf by the undersigned, thereunto authorized, in the City of Peoria, the State of Illinois.

CATERPILLAR 401(k) PLAN

| | | |
|-----------------|-----|--------------------------------------------------------------------------------|
| August 16, 2010 | By: | /s/Jonathan D. Ginzel Name: Jonathan D. Ginzel Title: Plan Administrator |
|-----------------|-----|--------------------------------------------------------------------------------|

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Exhibit Index

| Exhibit No. | Description |
|-------------|---------------------------------------|
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