

HOUSE No. 5006

The Commonwealth of Massachusetts

INITIATIVE PETITION OF CHRISTOPHER ROBERT ANDERSON AND OTHERS.

OFFICE OF THE SECRETARY.

BOSTON, January 7, 2026.

Timothy Carroll
Clerk of the House of Representatives
State House
Boston, Massachusetts 02133

Sir: — I herewith transmit to you, in accordance with the requirements of Article XLVIII of the Amendments to the Constitution “An Initiative Petition for a Law Relative to Limiting State Tax Collection Growth and Returning Surpluses to Taxpayers,” signed by ten qualified voters and filed with this department on or before December 3, 2025, together with additional signatures of qualified voters in the number of 85,588, being a sufficient number to comply with the provisions of said Article.

Sincerely,

WILLIAM FRANCIS GALVIN
Secretary of the Commonwealth.

AN INITIATIVE PETITION.

Pursuant to Article XLVIII of the Amendments to the Constitution of the Commonwealth, as amended, the undersigned qualified voters of the Commonwealth, ten in number at least, hereby petition for the enactment into law of the following measure:

HOUSE No. 5006

The Commonwealth of Massachusetts

In the One Hundred and Ninety-Fourth General Court
(2025-2026)

An Act relative to limiting state tax collection growth and returning surpluses to taxpayers.

Be it enacted by the People, and by their authority, as follows:

1 SECTION 1. Section 2 of chapter 62F of the General Laws as appearing in the 2024
2 Official Edition is hereby amended by replacing the definitions of “Computed Maximum State
3 Tax Revenues” and “State Tax Revenues” with the following —

4 “Computed Maximum State Tax Revenues” means for any fiscal year beginning after
5 June 30, 2027 an amount determined by multiplying the Net State Tax Revenues, as defined
6 herein, for the immediately preceding fiscal year by the allowable state tax growth factor, as
7 defined herein, for the then current fiscal year.

8 “State Tax Revenues” means the revenues of the Commonwealth from every tax, surtax,
9 receipt, penalty and other monetary exaction, and interest in connection therewith, including but
10 not limited to, taxes and surtaxes on personal income (including, for purposes of any calculation
11 under this chapter beginning after June 30, 2027, income surtax revenues collected and deposited
12 into the Education and Transportation Fund pursuant to Section 2BBBBBB of chapter 29 of the
13 General Laws), excises and taxes on retail sales and use, meals, motor vehicle fuels, businesses
14 and corporations, public utilities, alcoholic beverages, tobacco, inheritances, estates, deeds, room

occupancy and pari-mutuel wagering; but excluding federal reimbursements, proceeds from bond issues, earnings on investments, tuitions, fees, service charges and other departmental revenues, and revenues directly attributable to the additional taxes levied pursuant to section eighty-eight of chapter six hundred and eighty-four of the Acts of nineteen hundred and seventy-five.

SECTION 2. Effective for purposes of any calculation under chapter 62F of the General Laws as appearing in the 2024 Official Edition for any fiscal year beginning after June 30, 2027, Section 2BBBBBB of chapter 29 of the General Laws as appearing in the 2024 Official Edition is hereby amended by striking out subparagraph (d).

SECTION 3. The provisions of this law are severable, and if any clause, sentence, paragraph or section of this chapter, or an application thereof, shall be adjudged by any court of competent jurisdiction to be invalid, such judgment shall not affect, impair, or invalidate the remainder thereof but shall be confined in its operation to the clause, sentence, paragraph, section, or application adjudged invalid.

FIRST TEN SIGNERS

<u>NAME</u>	<u>RESIDENCE</u>	<u>CITY OR TOWN</u>
Christopher Robert Anderson	18 Lillian Way	Wayland
James John Stergios	584 Washington Street	Brookline
Christopher Richard Carlozzi	115 Lester Road	Brockton
Jon B. Hurst	99 Grover Street	Beverly
Elizabeth Karoline Mahoney	28 Mount Vernon Street	Arlington
Paul D. Craney	80 Osgood Street	North Andover
Pauline Ann Zywaski	62 Russett Road	Boston
Stephen D. Fantone	340 Summer Street	Lynnfield
Richard F. Laws	5 Elderberry Road	Westford
Marc Armand Brunelle	225 Bay Drive	Sudbury

CERTIFICATE OF THE ATTORNEY GENERAL.

September 3, 2025.

Honorable William Francis Galvin
Secretary of the Commonwealth
One Ashburton Place, Room 1705
Boston, Massachusetts 02108

Re: Initiative Petition No. 25-17: Initiative Petition for a Law Relative to
Limiting State Tax Collection Growth and Returning Surpluses to Taxpayers

Dear Secretary Galvin:

In accordance with the provisions of Article 48 of the Amendments to the Massachusetts Constitution, I have reviewed the above-referenced initiative petition, which was submitted to me on or before the first Wednesday of August of this year.

I hereby certify that this measure is in proper form for submission to the people; that the measure is not, either affirmatively or negatively, substantially the same as any measure which has been qualified for submission or submitted to the people at either of the two preceding biennial state elections; and that it contains only subjects that are related or are mutually dependent and which are not excluded from the initiative process pursuant to Article 48, the Initiative, Part 2, Section 2.

In accordance with Article 48, I enclose a fair, concise summary of the measure.

Sincerely,

ANDREA JOY CAMPBELL,
Attorney General.

SUMMARY OF 25-17

This proposed law would change the limit on how much revenue the state can collect in a given year. The proposal would limit state revenue in a given year to the net amount of state revenue from the year before, increased by a rate equal to the average growth of wages and salaries in Massachusetts over the most recent three years. If revenue collected by the state in a given year exceeds the limit, the excess amount would be refunded to taxpayers the following year. The proposed law would include all revenue from the surtax on incomes over \$1 million when calculating the revenue limit and when determining whether state revenue exceeds the limit.

The provisions of the proposed law would all be effective as of July 1, 2027.

The proposed law states that, if any of its parts were declared invalid, the other parts would stay in effect.